

# Public Radio Today 2010

## How America Listens to Radio



# Public Radio Today 2010 Edition

Featuring new format ratings and audience information across America from the Fall 2009\* Arbitron survey of radio listening to these leading public radio formats:

- News/Talk
- News-Classical
- Classical Music
- News-Music
- Adult Album Alternative (AAA)
- Jazz
- News-Jazz
- Variety Music
- News-AAA

\*October-November-December 2009 Surveys in the PPM™ Service

*Published by Arbitron Marketing Communications*

**PPM ratings are based on audience estimates and are the opinion of Arbitron and should not be relied on for precise accuracy or precise representativeness of a demographic or radio market.**

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# How America Listens to Public Radio

Public radio continues to be a vibrant and relevant part of many Americans' lives. The medium plays an important role in today's media landscape by providing important programming not available anywhere else. Public radio is also meeting the challenges of a crowded media landscape by taking full advantage of technological innovations, including podcasting, Internet streaming and HD Radio® multicasting.

*Public Radio Today 2010* is an in-depth look at the listening activity to the nine most popular public radio formats representing the Fall 2009 Diary and October-November-December 2009 PPM survey periods: News/Talk, News-Classical, Classical Music, News-Music, Adult Album Alternative (AAA), Jazz, News-Jazz, Variety Music and News-AAA.

In addition to audience statistics about public radio listeners overall, you'll find detailed audience breakouts for each of these formats, including Average Quarter-Hour (AQH) Share of the total public radio audience and its weekly reach in terms of total listeners (Cume), segmentation of audience composition by age, Time Spent Listening (TSL) by demographic, education levels, income by household, gender balance, ratings by daypart and state-by-state index and listening by location (at-home vs. out-of-home).

*Public Radio Today 2010* also includes Scarborough consumer data to present a comprehensive consumer profile of public radio listening across America. This in-depth profile is drawn with information on public radio listeners' household characteristics and consumption behaviors among several popular product categories.

We thank these public radio organizations for helping us shape this study and invite you to visit their Web sites to learn more about their contributions to public radio:

- Radio Research Consortium ([www.rrconline.org](http://www.rrconline.org))
- American Public Media ([www.publicradio.org](http://www.publicradio.org))
- National Public Radio ([www.npr.org](http://www.npr.org))
- Public Radio International ([www.pri.org](http://www.pri.org))

# What's New in This Edition

## **Updated Detailed Analyses, and a New Format Is Profiled**

*Public Radio Today 2010* offers an analysis of audience listening patterns and demographics of the nine most popular public radio formats: News/Talk, News-Classical, Classical Music, News-Music, Adult Album Alternative (AAA), Jazz, News-Jazz, Variety Music and News-AAA. Adult Album Alternative (AAA) was formerly known as Adult Album Alternative (AAA)/Eclectic, and this is the first time we are reporting on the News-AAA format.

## **New State-by-State “Heat Index”**

We have replaced the national map that was based on census regions with a state-by-state “heat index” map. Now you can see at a glance how the formats perform in each state across the country compared to the format’s national average (states with no public stations that met Arbitron’s Minimum Reporting Standards are shown in gray).

## **A New Slate of Scarborough Qualitative Categories**

Each year we mine our vast Scarborough consumer profile database to show interesting and useful information about the public radio listener. This year the featured categories are: financial planning, business travel, automotive preferences, food and beverage consumption and online activity.

## **More Markets Represented by the Arbitron PPM Service**

The Arbitron Portable People Meter™ System measured listening behavior in 33 Metro areas—representing about 54% of the 12+ population in the Metro markets measured by Arbitron—during the three-month period covered by *Public Radio Today 2010*. Audience data from PPM markets were combined with data from Diary markets to create the information in this report. For a list of markets that were measured by the Arbitron PPM service as of December 2009, go to [www.arbitron.com/ppm](http://www.arbitron.com/ppm) and select the “PPM Commercialization Schedule.” Owing to PPM measurement disruptions as a result of Hurricane Ike in October 2008, Houston-Galveston data were not used for the Arbitron *Radio Today 2009* studies but are included in the 2010 studies.

## **What Have We Learned About the PPM System So Far?**

In our experience of measuring radio listening using the PPM system, certain characteristics stand in contrast to what we have observed using Diary measurement—the typical listener in the PPM system is exposed to nearly twice as many radio stations in a given week and uses radio on far more occasions than what is typically reported in the Diary. The increase in the number of occasions is usually offset by a lower amount of Time Spent Listening per occasion in the PPM service than in the Diary. However, we have not seen consistent patterns in the amount of reported listening to a particular radio format or by particular demographic groups in the PPM service when compared to the Diary; these statistics can vary widely by market.

# Public Radio Format Summaries

## **News/Talk Remains the Most-Listened-To Public Radio Format**

A dozen more stations adopted this format over the last year, and News/Talk captures nearly half of all public radio listening. The format's ratings are off somewhat from the stellar ratings of the previous year (Fall 2008, which included the final month of the presidential campaign and the subsequent election).

## **News-Classical's Ratings Rose**

Despite fewer stations in the format this time around, News-Classical's ratings rose; the return of a Houston station—its ratings weren't included in *Radio Today 2009* due to the effects of Hurricane Ike—likely contributed to the increase.

## **Classical Experiences Big Boost**

The addition of nine stations to the format, combined with a steady decline in the number of commercial Classical stations, helped give public Classical the biggest increase of any public radio format this year.

## **News-Music Off Modestly Despite Large Loss of Stations**

Nearly 30% of the public News-Music stations were recharacterized to other formats between our 2009 and 2010 reports, yet the format only lost half a share point.

## **Adult Album Alternative (AAA) Holding Steady, News-AAA Debuts**

Formerly known as AAA/Eclectic, this format had 11 fewer stations in Fall 2009 compared to a year earlier, but its numbers are relatively stable in this report. There's also a new format this year: 39 stations that were formerly recognized as News, AAA or News-Music are now classified as News-AAA.

## **Jazz Format Falls Slightly, News-Jazz Sees Increase**

A decline in Time Spent Listening to Jazz contributed to the format's AQH decline over the last couple of reports. On the other hand, more stations are programming News-Jazz and that format saw a big increase in Cume audience over the last year.

## **Variety Music Jumps in Station Count, Ratings**

Some 26 new Variety Music stations helped give the format a big bump in its share of the public radio audience.

# About Public Radio Today 2010

## **Public Radio Today 2010 Is Published by Arbitron Inc.**

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## **Average Quarter-Hour Persons (AQH Persons)**

The average number of persons listening to a particular station for at least five minutes during a 15-minute period. In PPM markets those five minutes need not be consecutive.

## **Average Quarter-Hour Rating (AQH Rating or AQH PUR)**

The Average Quarter-Hour Persons estimate expressed as a percentage of the population being measured.

$$\frac{\text{AQH Persons}}{\text{Population}} \times 100 = \text{AQH Rating (\%)}$$

## **Cume Persons**

The total number of different persons who tune in to a radio station during the course of a week for at least five minutes.

## **Cume Rating or Cume PUR**

The Cume Persons audience expressed as a percentage of all persons estimated to be in the specified demographic group.

$$\frac{\text{Cume Persons}}{\text{Population}} \times 100 = \text{Cume Rating (\%)}$$

## **Format Share**

The percentage of those listening to radio in the Metro who are listening to a particular radio station format.

$$\frac{\text{AQH Persons to a specific format}}{\text{AQH Persons to all formats}} \times 100 = \text{Share (\%)}$$

## **Index**

A numerical comparison of one percentage to another, with 100 being the norm.

## **Time Spent Listening (TSL)**

An estimate of the amount of time the average listener spent with a station (or total radio) during a particular daypart. This estimate, expressed in hours and minutes, is reported for the Metro only.

$$\frac{\text{Quarter-Hours in a time period} \times \text{AQH Persons}}{\text{Cume Audience}} = \text{TSL}$$

# Public Radio Formats

## **Public Radio Formats**

Public radio stations cover a wide variety of news, entertainment, music and cultural genres. The programming format of a public station, like that of a commercial station, largely determines the kind of audience it attracts, as well as characteristics such as Time Spent Listening.

Most of the formats featured in Arbitron *Public Radio Today* differ from those listed in commercial radio versions of *Radio Today*. This is because the contrasting nature of public and commercial programming has led to radio formats that are distinctively public or commercial. The nine formats examined in this study are the leading formats in public radio programming. Their definitions were supplied to Arbitron by the public radio research and programming consortia noted on Page 4. Each station's format was determined based on the station's programming during the Monday-Friday, 6AM-7PM dayparts. Nationwide, 906 public radio stations met Arbitron's Minimum Reporting Standards and those data were included in this year's study.

## **Some Notes About the Format Pages**

The "Education" and "Household Income" charts only include responses from listeners 18 or older. In the information on homeownership, the term "Other" refers to the percentage of a format's listeners who neither own nor rent. The "Audience Composition" information shows how each age group contributes to that format's total audience. For additional terms and definitions, please see the Glossary on the preceding page.

## **Some Items to Consider When Comparing Recent Editions of *Public Radio Today***

Several important factors affected radio ratings data over the last several years: We did not publish a *Public Radio Today* study in 2008 (representing the 2007 data year), which could account for some larger-than-typical shifts in the data trends between 2006 and 2008. The 2008 presidential election (the period used in *Public Radio Today 2009*) likely accounted for some of the changes in reported listening to certain formats. Portable People Meter data were included for the first time in the 2009 report, and the number of markets measured by the PPM service was expanded for this report. As a result of Hurricane Ike in 2008, data from a few important public radio stations in Houston were not represented in the 2009 report but returned for the 2010 report. Combined, these factors make trending analysis for the periods between Fall 2006 and Fall 2010 difficult. Users of this study should consider the data as presented accordingly.

## AQH Share of All Public Radio Listening

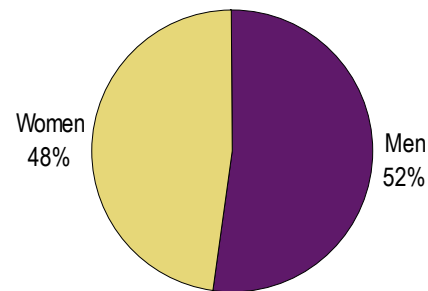
FA05	44.8%
FA06	43.6%
FA08	47.9%
<b>FA09</b>	<b>44.8%</b>

## Weekly Listeners 12+

**15,317,900**  
Format Cume

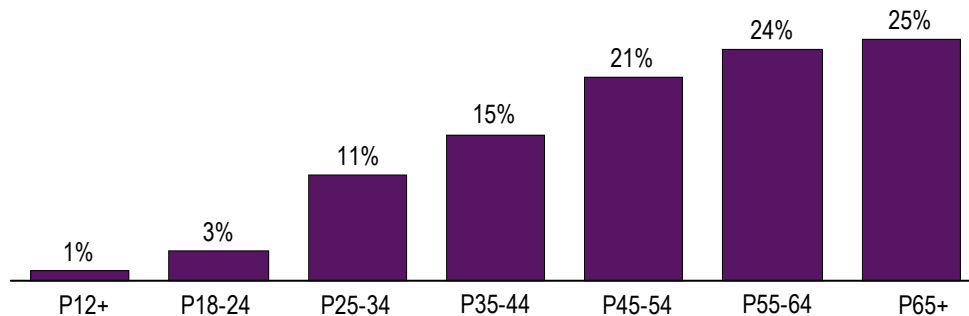
## Listeners 12+

Mon-Sun, 6AM-Mid



## Audience Composition

Percent of Format Audience by Demographic  
Mon-Sun, 6AM-Mid



Public News/Talk features a heavy concentration of local, regional and global news in the form of magazine features, analysis and live-breaking news. Its wide range of programming encompasses interviews, studio discussions with guests, listener participation (via phone, e-mail and social networking) and live broadcasts of town hall meetings. This format is now programmed by 333 stations across the U.S., 12 more than last year.

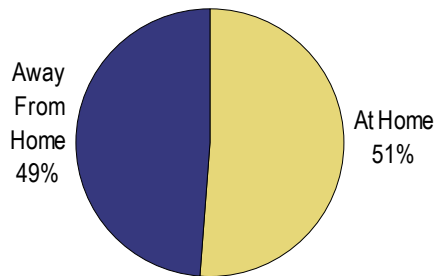
News/Talk continues to be the dominant public radio format; its 12+ audience share and reach is over twice as large as the next strongest public format. The format's 47.9 share of all public radio quarter-hours of listening in the previous survey (during the heat of the 2008 Presidential election campaign) seems to have been a high-water mark: its AQH share tapered off by about three percentage points in the year since (a similar phenomenon occurred among commercial N/T radio). Likewise, public News/Talk's reach in the current report is 4% smaller than in 2008, also probably reflective of a less active news cycle.

The audience age composition for this format is relatively stable—about 70% of its audience is over 45 years old, about 1% more than in the previous year.

Source: TAPSCAN Web, Fall 2009. Note: Due to rounding, totals may not add to 100.

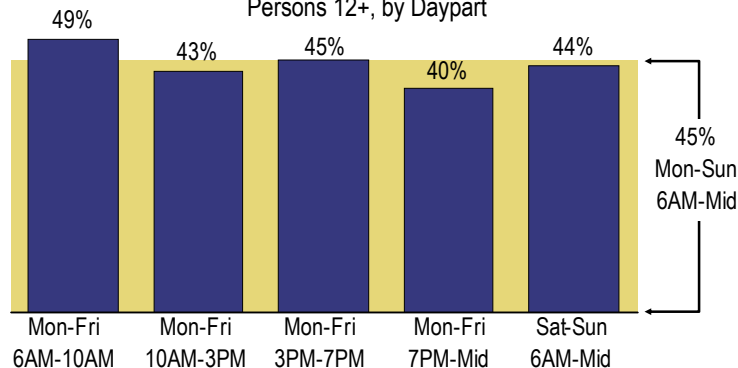
## AQH Share of Listening by Location

Mon-Sun, 6AM-Mid, Persons 12+



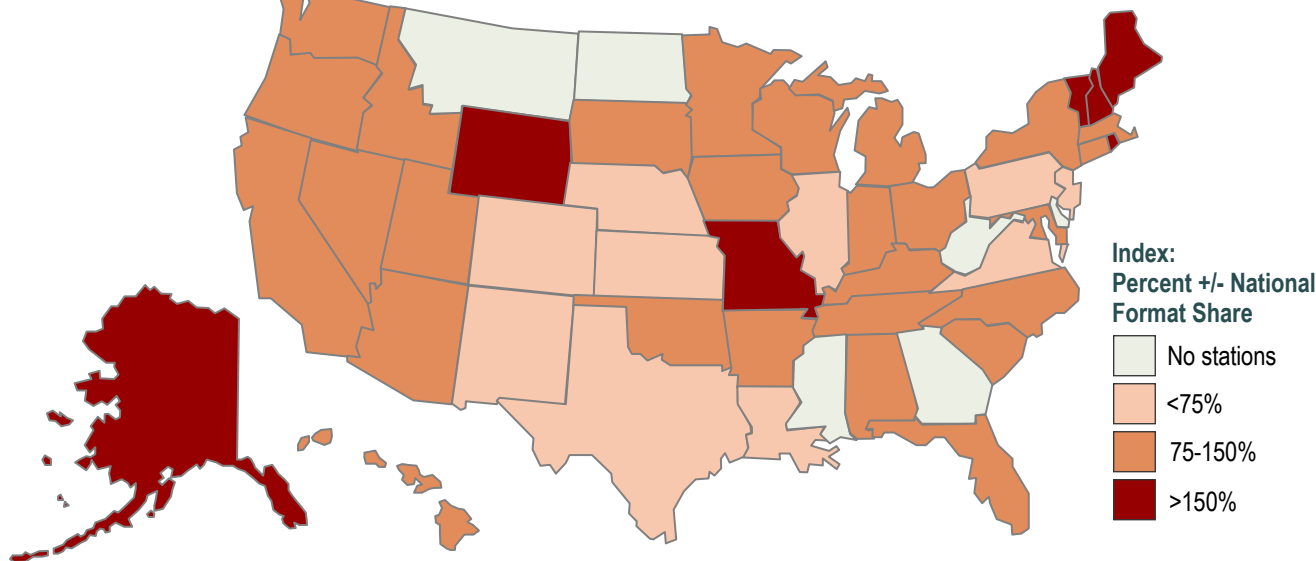
## News/Talk Share of All Public Radio Listening

Persons 12+, by Daypart



## Audience Share by State

Mon-Sun, 6AM-Mid, Persons 12+, AQH Shares



Source: TAPSCAN Web, Fall 2009. Note: Due to rounding, totals may not add to 100.

Public News/Talk listeners split their listening almost equally between the home and other locations; however, this year there was an ever-so-slight shift (1%) in favor of listening in the home.

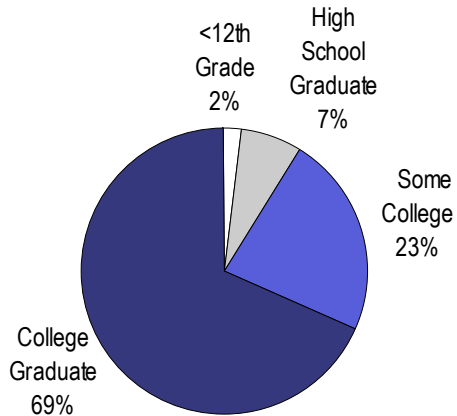
When measured across the various dayparts, public News/Talk remained the dominant format among all public radio, but not by as much as in the previous year—its quarter-hour shares in the major dayparts were off by about three percentage points across the board. News/Talk continues to perform best in morning drive followed by afternoon drive, weekends and middays.

New to *Public Radio Today 2010* is an interesting “heat index” map showing how the format performs in each of the 50 states. This map replaces the map depicting format performance in the principal census regions. What’s interesting to note about public News/Talk is that most states have at least one station in the format that met Arbitron’s minimum reporting standard and whose audience estimates contributed to the statistics in this study.

continued ►

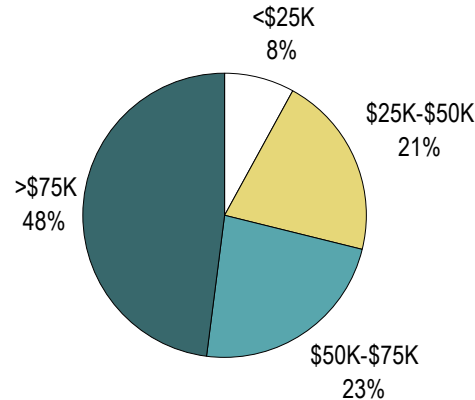
## Education

Persons 18+



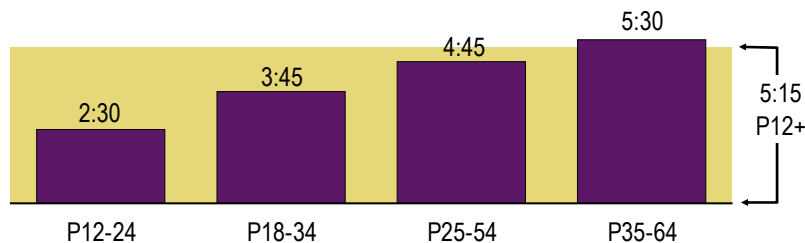
## Household Income

Persons 18+



## Time Spent Listening by Demographic

(Hours:Minutes)  
Mon-Sun, 6AM-Mid



Public News/Talk continues to have public radio's most-educated listeners: Nearly 70% hold a college degree or better, and 92% have attended college. Those figures are far stronger than all commercial radio formats and all other public radio programming. Some 48% of News/Talk listeners live in households earning \$75,000 or more per year. Impressive indeed, but that figure is nearly three percentage points lower than in the previous year. Perhaps a reflection of a rough economy? You'll see that most of the other public radio formats (as well as most commercial radio formats for that matter) experienced similar circumstances.

At five hours, 15 minutes per week, Time Spent Listening to public News/Talk is third-longest of all formats, trailing News-Classical and News-Music. The reported TSL for each of the major age groups was lower than in the previous year, probably owing to the larger proportion of markets being measured by the Arbitron PPM service (see Page 5 for an explanation of how the change in measurement methodology can affect certain listening statistics).

## AQH Share of All Public Radio Listening

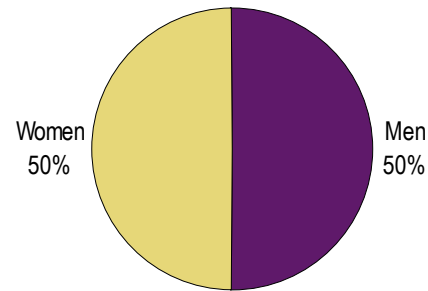
FA05	20.6%
FA06	21.1%
FA08	20.2%
<b>FA09</b>	<b>21.2%</b>

## Weekly Listeners 12+

**6,526,900**  
Format Cume

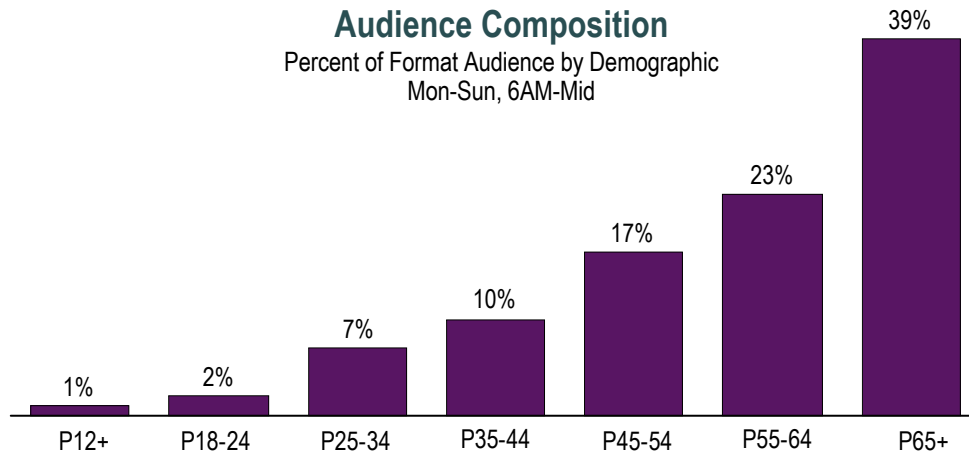
## Listeners 12+

Mon-Sun, 6AM-Mid



## Audience Composition

Percent of Format Audience by Demographic  
Mon-Sun, 6AM-Mid



News-Classical stations devote at least 30% of airtime to news, public affairs or talk programming or carry NPR newsmagazines. In addition, these stations spend at least 30% of their Monday-Friday 6AM-7PM airtime playing classical music.

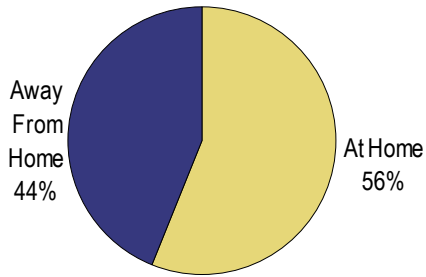
Some 250 stations programmed this format in the Fall of 2009, about 13 fewer than a year earlier. Despite fewer stations in the format, its share of listening actually grew between Fall 2008 and Fall 2009 and remains the dominant public format that includes music. When measured according to Cume audience, the format is stable from the previous year but is off by nearly 500,000 listeners compared to Fall 2006. (It should also be noted that KUHF Houston, which was excluded from *Public Radio Today 2009* due to the effects of Hurricane Ike, returned to this report).

News-Classical's audience is equally divided among the genders, and its age composition has crept up to the point where 62% of its audience composition is 55 or older.

# News-Classical

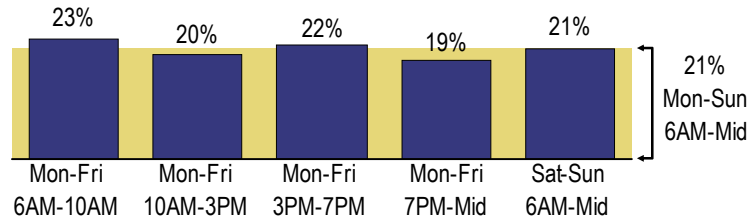
## AQH Share of Listening by Location

Mon-Sun, 6AM-Mid, Persons 12+



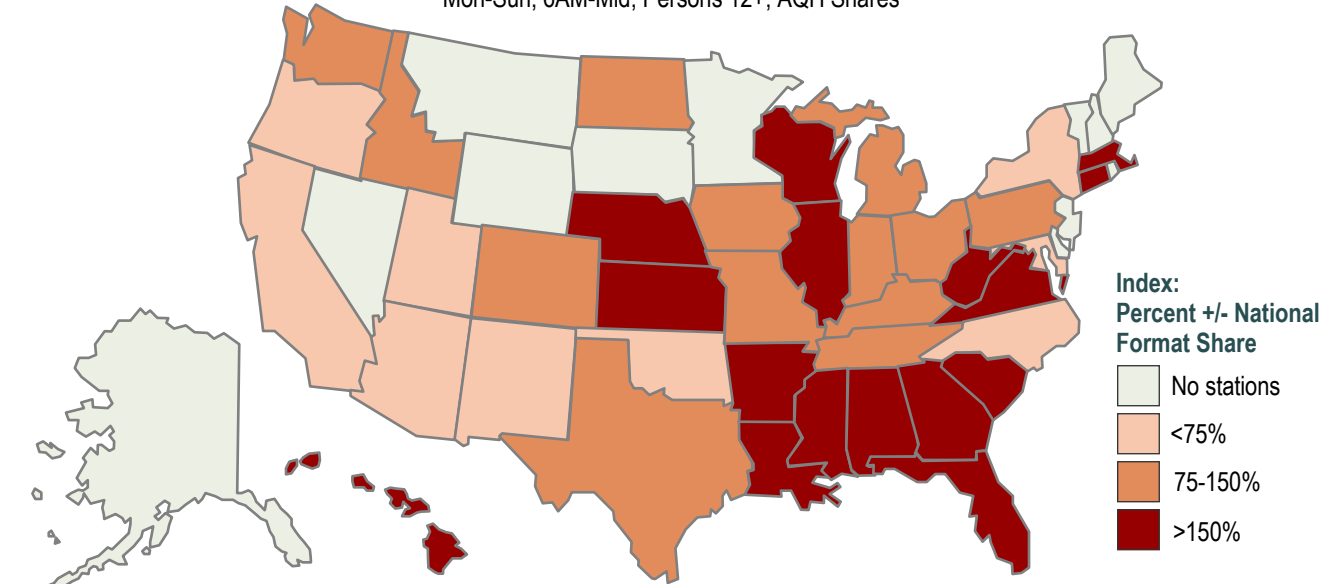
## News-Classical Share of All Public Radio Listening

Persons 12+, by Daypart



## Audience Share by State

Mon-Sun, 6AM-Mid, Persons 12+, AQH Shares



Source: TAPSCAN Web, Fall 2009. Note: Due to rounding, totals may not add to 100.

An increasing number of News-Classical listeners do so while at home: currently that figure stands at 56.3% compared to 53.5% three years ago.

When measured across the dayparts, News-Classical displays remarkable consistency, varying not far from its total-week AQH share.

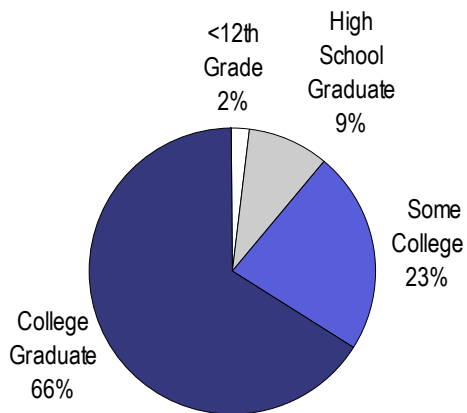
A glance at our new “Audience Share by State” heat index shows that News-Classical does well, for the most part, where standalone News/Talk and Classical stations are not as strong or don’t exist—such as in the band of seven Southern states or in clusters of other states in the Midwest or in the East.

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# News-Classical

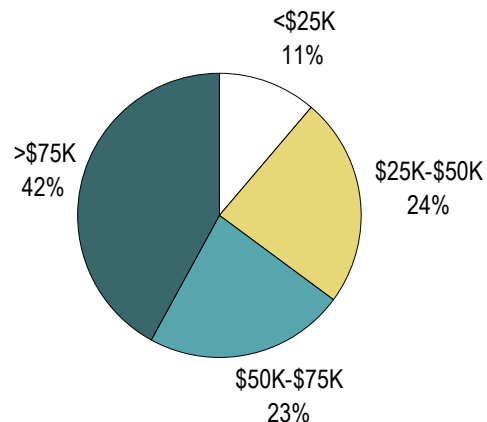
## Education

Persons 18+



## Household Income

Persons 18+



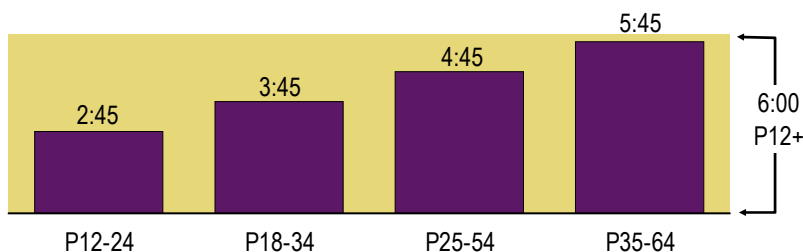
Nearly 90% of News-Classical listeners have attended college, a profile that has remained consistent over the years.

News-Classical listeners reside in households with high incomes—nearly two-thirds have \$50,000-plus incomes. The income distribution in this format is consistent with previous years.

Listeners tune to News-Classical longer than other public radio formats—about six hours per week. Even so, reported Time Spent Listening is lower following the introduction of more PPM measurement in additional markets (see Page 5 for an explanation of how the change in measurement methodology can affect certain listening statistics).

## Time Spent Listening by Demographic

(Hours:Minutes)  
Mon-Sun, 6AM-Mid



Source: TAPSCAN Web, Fall 2009. Note: Due to rounding, totals may not add to 100.

# Classical Music

## AQH Share of All Public Radio Listening

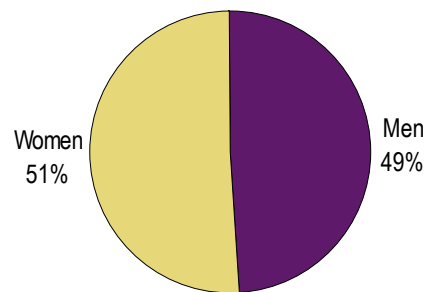
FA05	13.1%
FA06	12.9%
FA08	13.7%
<b>FA09</b>	<b>15.4%</b>

## Weekly Listeners 12+

**6,025,000**  
Format Cume

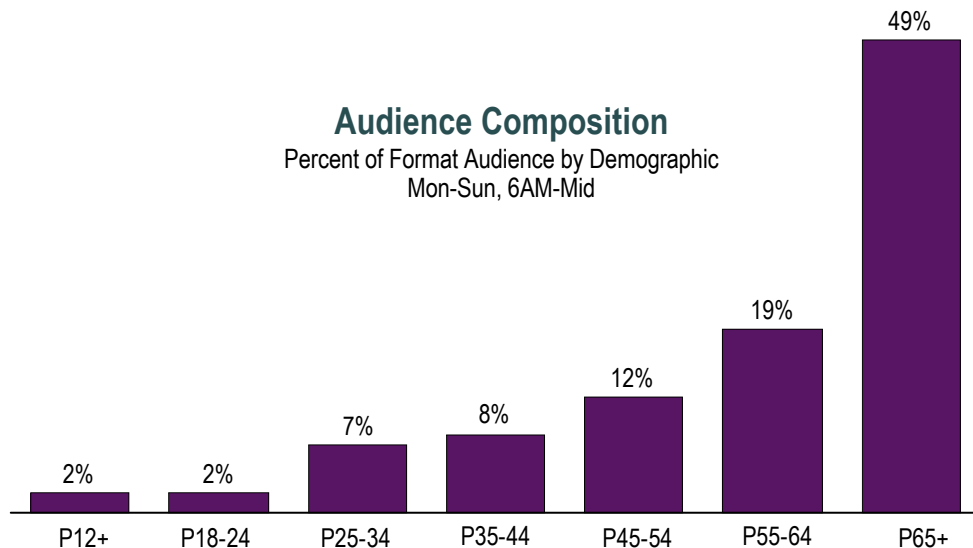
## Listeners 12+

Mon-Sun, 6AM-Mid



## Audience Composition

Percent of Format Audience by Demographic  
Mon-Sun, 6AM-Mid



The hallmark of classical music is its quality; it is written by a composer for performance by a group of musicians, with each instrument's part carefully specified. Most classical music is performed in the European tradition by orchestras, choirs, chamber music groups, opera companies and symphonies. The Classical Music radio format, in addition to its distinctive programming, may also include artist interviews and musical puzzles and games.

Listening to public Classical stations experienced another growth spurt in Fall 2009, rising 1.7 share points in just a year. The increase can likely be attributed to several factors: an increase in the number of stations programming the format (from 100 in Fall 2008 to 109 in Fall 2009); a steady decline of Classical music stations in the commercial band, driving more audience to public Classical stations; and the inheritance of some audience that public News/Talk had lost.

In recent years, Classical's gender composition has become increasingly male. In the Fall of 2009, about 49% of the audience was male compared to 45% four years earlier.

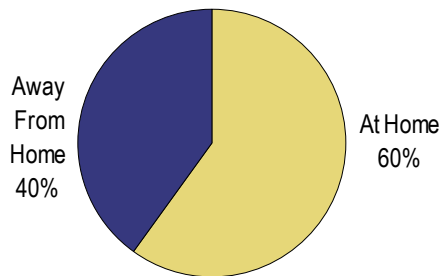
Classical radio's age composition got younger over the last year: its sub-55 audience grew from 29% in Fall 2008 to 32% in the current study.

Source: TAPSCAN Web, Fall 2009. Note: Due to rounding, totals may not add to 100.

# Classical Music

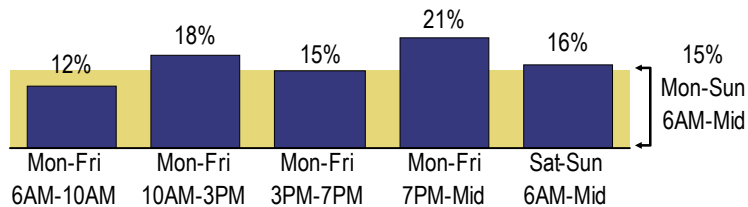
## AQH Share of Listening by Location

Mon-Sun, 6AM-Mid, Persons 12+



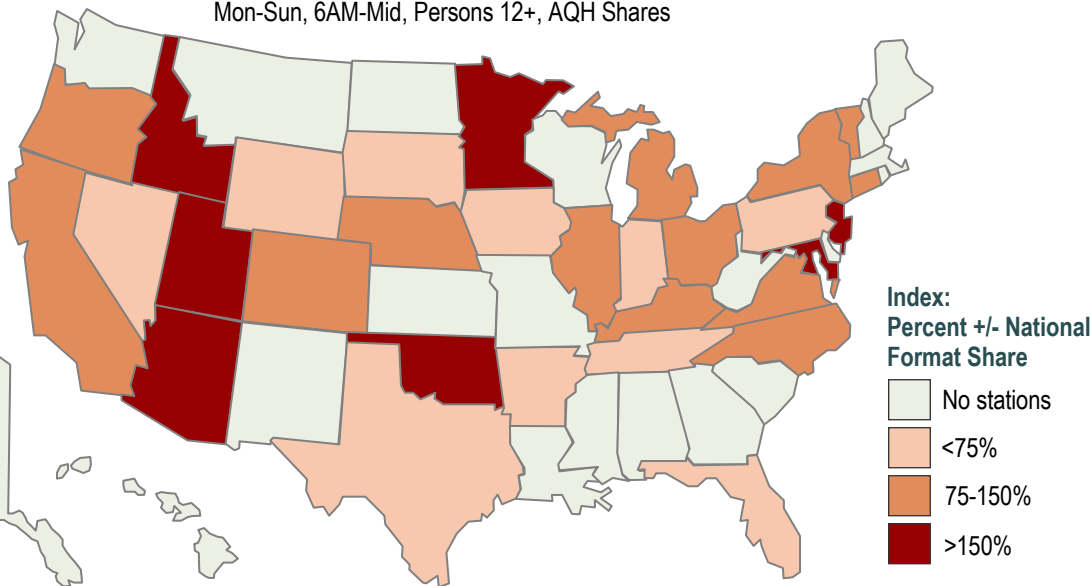
## Classical Music Share of All Public Radio Listening

Persons 12+, by Daypart



## Audience Share by State

Mon-Sun, 6AM-Mid, Persons 12+, AQH Shares



Source: TAPSCAN Web, Fall 2009. Note: Due to rounding, totals may not add to 100.

Classical's proportion of at-home listening is higher than any other public radio format; the 60% level of at-home listening has been consistent in recent years.

Among the dayparts, Classical earns its ratings in middays and evenings. Over the past year its biggest boost in ratings happened in the Monday-Friday, 7PM-Midnight daypart—more than three share points higher in Fall 2009 than a year earlier.

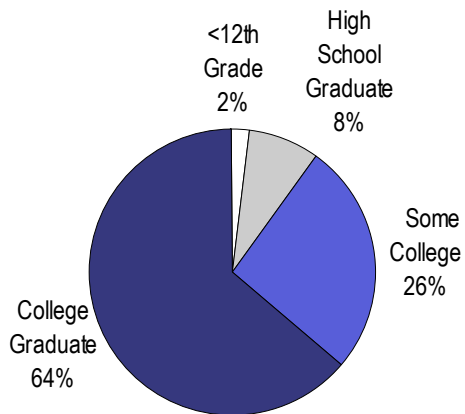
According to the new "Audience Share by State" heat index, Classical's strength occurs where News-Classical stations are in short supply. It also nears its national average in several populous states, including California, New York, Illinois, Ohio and Michigan.

continued ►

# Classical Music

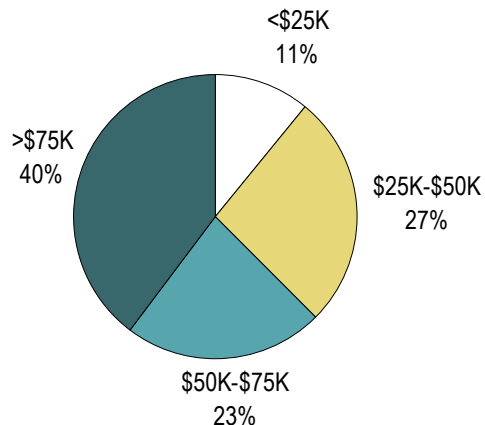
## Education

Persons 18+



## Household Income

Persons 18+



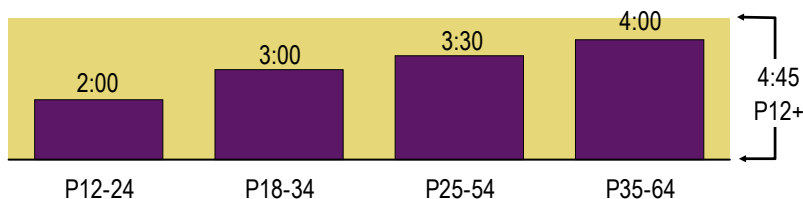
Like several public radio formats, Classical boasts a listenership that is 90% college educated.

About 63% of Classical listeners live in homes with an income of \$50,000 or above, a figure that is lower by a few percentage points than the previous year but higher than it was in Fall 2006.

Classical's four hours, 45 minutes of average weekly Time Spent Listening is more than any other pure music public format. Its reported Time Spent Listening was lower in 2009 following the introduction of more PPM measurement in additional markets (see Page 5 for an explanation of how the change in measurement methodology can affect certain listening statistics).

## Time Spent Listening by Demographic

(Hours:Minutes)  
Mon-Sun, 6AM-Mid



Source: TAPSCAN Web, Fall 2009. Note: Due to rounding, totals may not add to 100.

## AQH Share of All Public Radio Listening

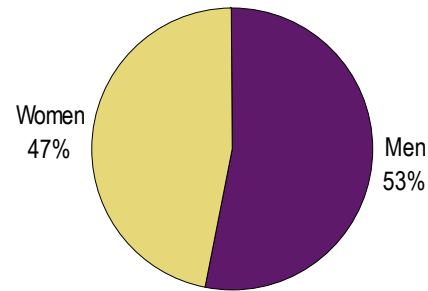
FA05	5.7%
FA06	6.0%
FA08	6.2%
<b>FA09</b>	<b>5.6%</b>

## Weekly Listeners 12+

**1,778,800**  
Format Cume

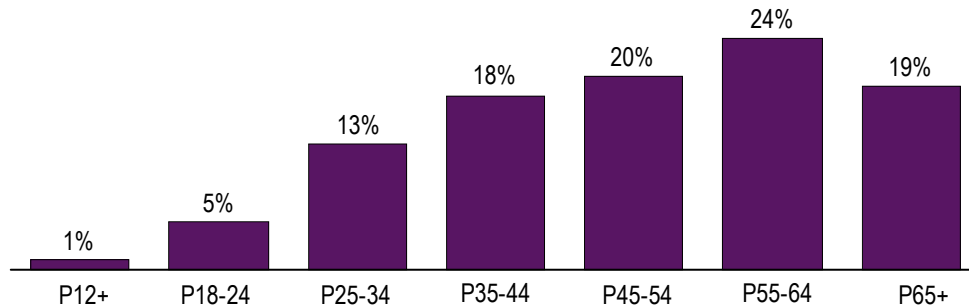
## Listeners 12+

Mon-Sun, 6AM-Mid



## Audience Composition

Percent of Format Audience by Demographic  
Mon-Sun, 6AM-Mid



News-Music dedicates at least 30% of airtime to news, public affairs or talk programming or NPR newsmagazines. In addition, News-Music stations spend at least 30% of their airtime with a mix of music formats (such as Classical, Jazz, AAA, popular), typically with no single music format dominating that time.

The number of stations programming this format fell from 154 to 113 over the last year (86 of which met Arbitron's minimum reporting standard and were included in these statistics), resulting in a 22% decline in 12+ Cume persons and a slight decline in AQH share. (It should also be noted that KPFT Houston, which was excluded from *Public Radio Today 2009* due to the effects of Hurricane Ike, returned to this report).

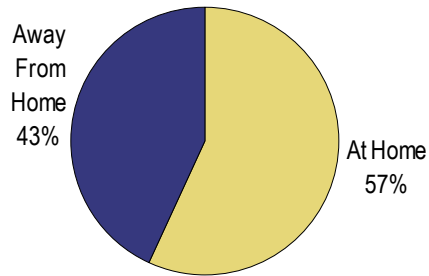
The format's proportion of listening by gender remains unchanged from previous years and leans slightly male.

News-Music's age composition declined notably in the Fall 2009 report; 37% of its AQH audience was below 45 compared to 32% in Fall 2008.

# News-Music

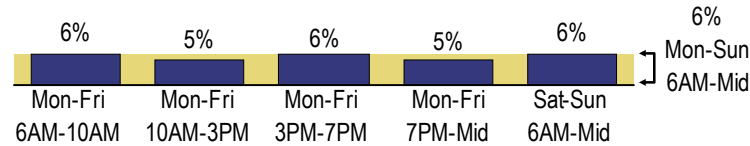
## AQH Share of Listening by Location

Mon-Sun, 6AM-Mid, Persons 12+



## News-Music Share of All Public Radio Listening

Persons 12+, by Daypart



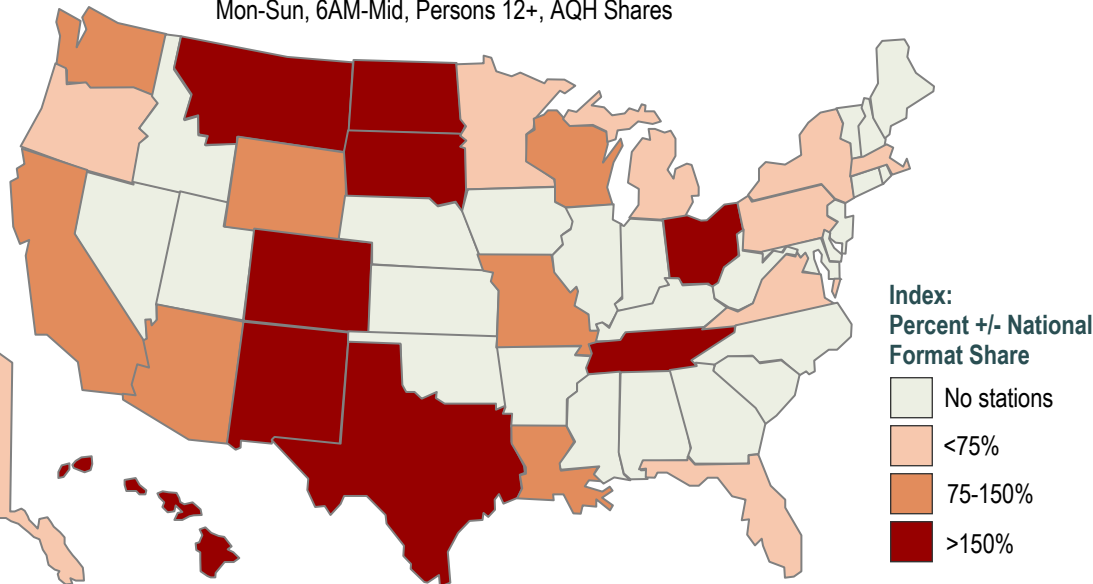
Over the last few years, the proportion of in-home listening to News-Music has increased, from 50% in Fall 2006 to 57% in Fall 2009.

The format's audience share across the dayparts is relatively even, although it is higher during drive times and on the weekends.

Thanks to some powerhouse News-Music stations in Texas, Ohio, New Mexico and Tennessee (among other states), the format performs well in several states.

## Audience Share by State

Mon-Sun, 6AM-Mid, Persons 12+, AQH Shares

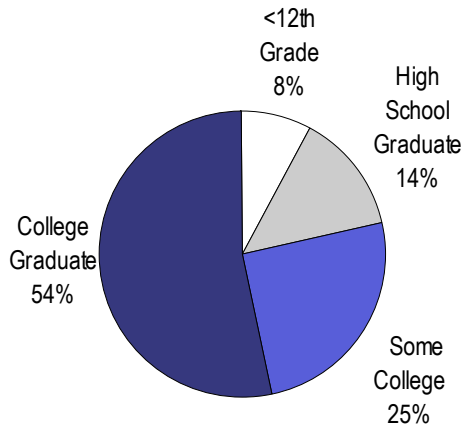


Source: TAPSCAN Web, Fall 2009. Note: Due to rounding, totals may not add to 100.

continued ►

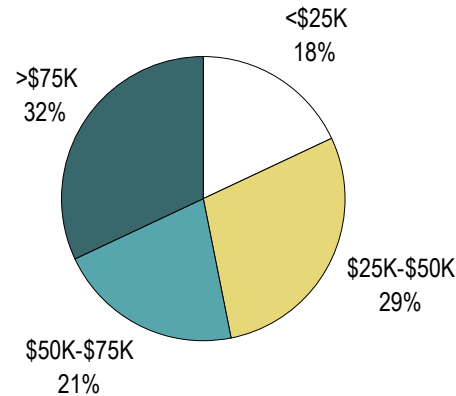
## Education

Persons 18+



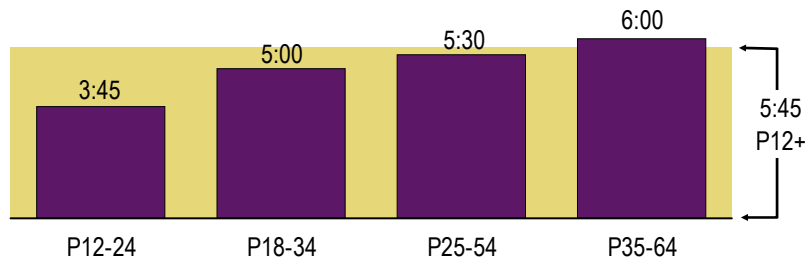
## Household Income

Persons 18+



## Time Spent Listening by Demographic

(Hours:Minutes)  
Mon-Sun, 6AM-Mid



Perhaps owing to News-Music's younger audience profile as noted on Page 19, its education profile has changed a bit as well: the percentage of listeners who hadn't (yet) attended college grew from 15% in Fall 2008 to 22% in Fall 2009.

Likewise, the format's income profile also changed: whereas 60% of its listeners in Fall 2008 lived in \$50,000+ income homes, that figure was 53% in Fall 2009.

The more interesting statistics for the News-Music format lie among the Time Spent Listening figures; this format saw the least decline in TSL than any of the public radio formats. The five hours, 45 minutes of average weekly listening in Fall 2009 was even with the Fall 2008 figure and none of the major demographic groups under age 65 saw more than a 15 minute change in Time Spent Listening over the last year.

# Adult Album Alternative (AAA)

## AQH Share of All Public Radio Listening

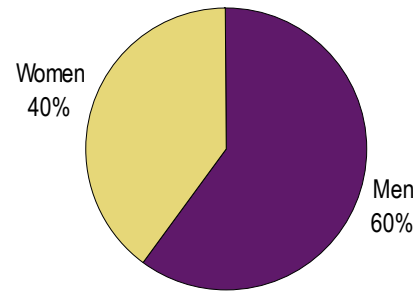
FA05	4.6%
FA06	5.1%
FA08	3.9%
<b>FA09</b>	<b>3.7%</b>

## Weekly Listeners 12+

**1,793,000**  
Format Cume

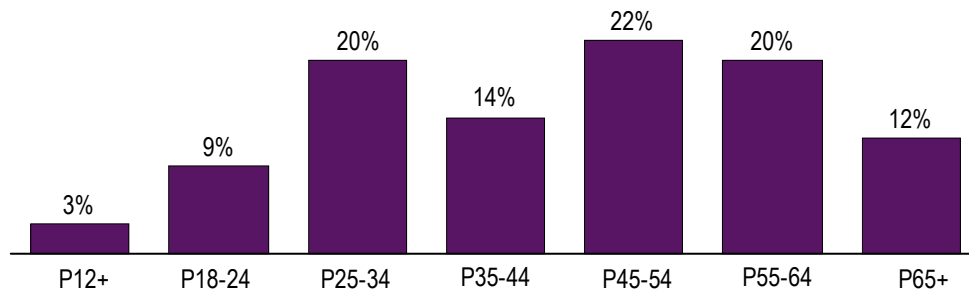
## Listeners 12+

Mon-Sun, 6AM-Mid



## Audience Composition

Percent of Format Audience by Demographic  
Mon-Sun, 6AM-Mid



Public radio's AAA (Adult Album Alternative or "Triple-A") stations are usually less mainstream than their commercial counterparts—certainly less so than hit radio formats—offering broader, deeper and more diverse playlists, often with numerous presenters with unique shows. Stylistically, AAA stations may play acoustic rock, blues, roots, Americana, folk, bluegrass, ambient and world music.

Some 57 public stations program this format, 11 fewer than in the prior year. Its quarter-hour share fell just slightly year to year, but its Cume listenership was up by about 4%.

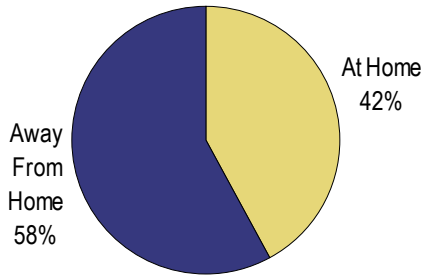
This is a decidedly male format (more than any other public format)—its 60% proportion of males has been consistent over recent years.

The format's audience age composition has interesting swings from year to year (this time, the proportion of 35-44 listeners fell dramatically), but one consistent factor is that AAA has a younger age profile than all other public radio formats.

# Adult Album Alternative (AAA)

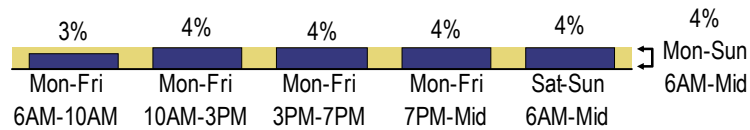
## AQH Share of Listening by Location

Mon-Sun, 6AM-Mid, Persons 12+



## Adult Album Alternative (AAA) Share of All Public Radio Listening

Persons 12+, by Daypart



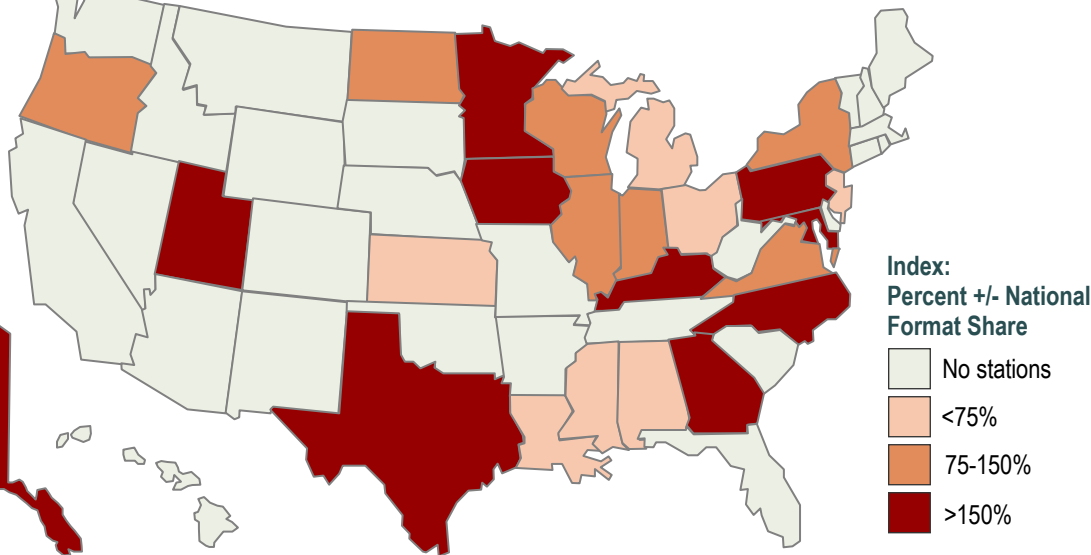
The AAA format experienced a slight listening migration to the home, but the great majority of its listening still occurs away from home.

Its share of listening by daypart is relatively equal across the day and week.

Due to the relatively few number of stations in the format, you'll see plenty of states with no AAA stations that made Arbitron's minimum reporting standard. Among those that do have stations, the majority are located east of the Rockies.

## Audience Share by State

Mon-Sun, 6AM-Mid, Persons 12+, AQH Shares



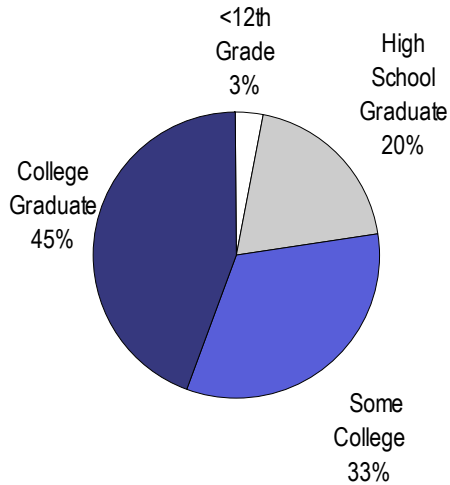
Source: TAPSCAN Web, Fall 2009. Note: Due to rounding, totals may not add to 100.

continued ►

# Adult Album Alternative (AAA)

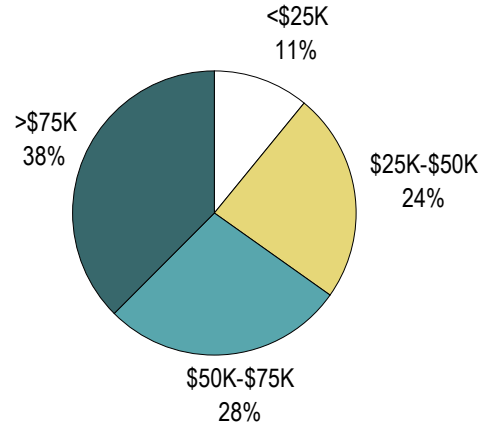
## Education

Persons 18+



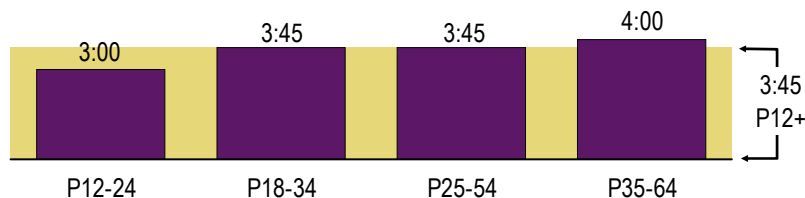
## Household Income

Persons 18+



## Time Spent Listening by Demographic

(Hours:Minutes)  
Mon-Sun, 6AM-Mid



Owing in part to AAA's relatively youthful audience, the proportion of listeners who have attended college is smaller than most other formats—and this figure is on the increase. In the Fall of 2006, 17% of this format's listeners had not attended college; in Fall 2009 that number had grown to a little over 22%.

About two-thirds of this format's listeners reside in households with an income of at least \$50,000, a number that has been relatively stable over the years. The percentage of \$75,000 households, on the other hand, has declined from 44% in Fall 2008 to 38% a year later.

Like most public radio formats, the reported Time Spent Listening to AAA is lower in this report, mostly likely due to the adoption of PPM measurement in additional markets (see Page 5 for an explanation of how the change in measurement methodology can affect certain listening statistics).

## AQH Share of All Public Radio Listening

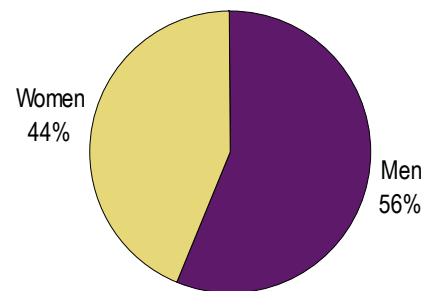
FA05	6.3%
FA06	6.2%
FA08	4.1%
<b>FA09</b>	<b>3.5%</b>

## Weekly Listeners 12+

**2,110,400**  
Format Cume

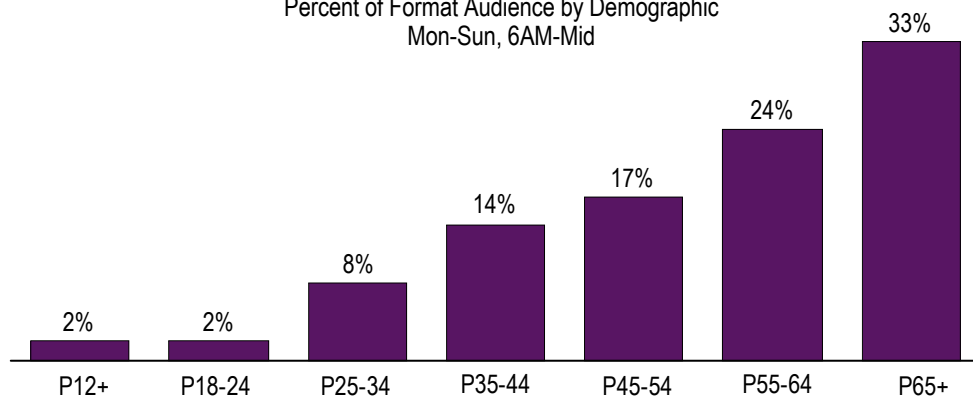
## Listeners 12+

Mon-Sun, 6AM-Mid



## Audience Composition

Percent of Format Audience by Demographic  
Mon-Sun, 6AM-Mid



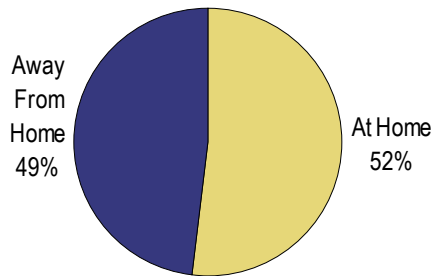
Rooted in musical traditions from West Africa, America (Gospel) and Europe (Harmony), jazz music is characterized by strong rhythmic patterns, syncopation, polyrhythms, spontaneity, improvisation and emotion. Jazz styles might include Traditional, Swing, Big Band, Be-Bop, Smooth and Latin Jazz.

The number of stations programming Jazz (37 in this report vs. 38 in Fall 2008) and the number of listeners to its stations (2.1 million in Fall 2009 vs. 2.2 million a year earlier) is stable. Jazz's Time Spent Listening figures are a major reason why its Average Quarter-Hour shares are on the decline.

Public radio Jazz listenership has tilted slightly more female over recent years, but men still make up the majority of listeners. It's also aged somewhat, going from 49% for 55+ in Fall 2005 to 57% four years later.

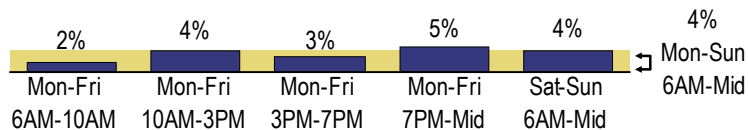
## AQH Share of Listening by Location

Mon-Sun, 6AM-Mid, Persons 12+



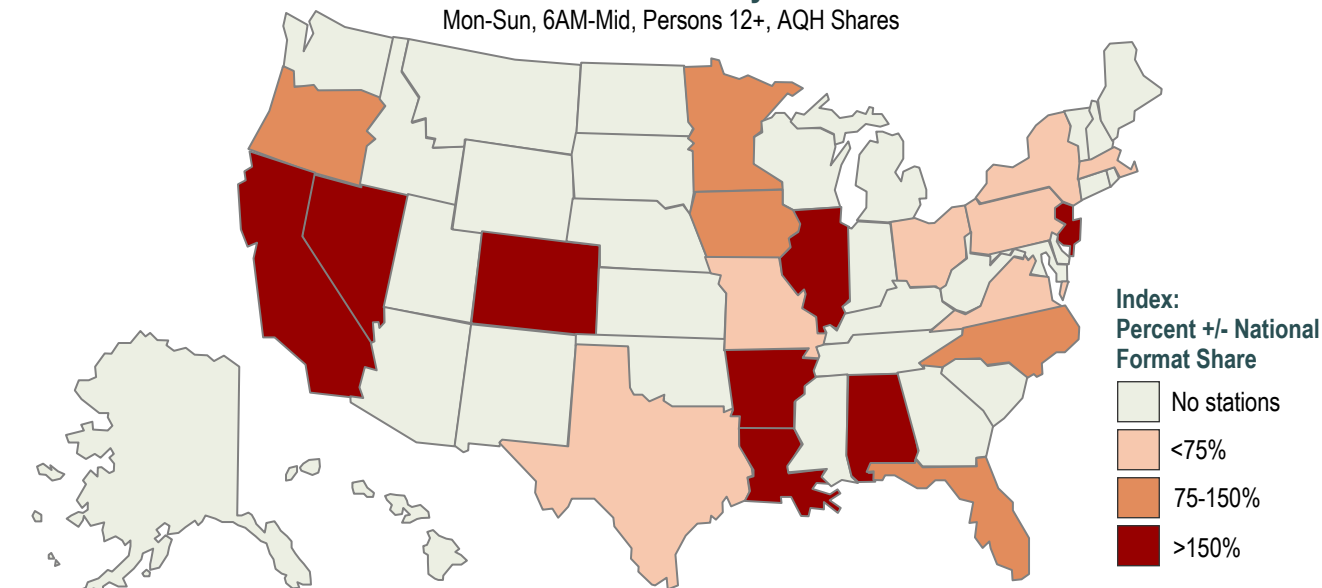
## Jazz Share of All Public Radio Listening

Persons 12+, by Daypart



## Audience Share by State

Mon-Sun, 6AM-Mid, Persons 12+, AQH Shares



Source: TAPSCAN Web, Fall 2009. Note: Due to rounding, totals may not add to 100.

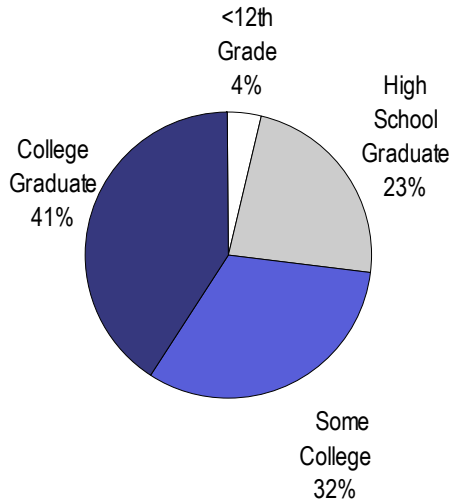
Jazz listeners divide their listening almost evenly between in-home and out-of-home locations. They enjoy their stations most during the midday and evening dayparts.

A good number of public Jazz stations are located in states that line the shores of the Mississippi River and certain other Jazz outposts. Perhaps not surprisingly, Louisiana indexes among the highest for Jazz radio.

continued ►

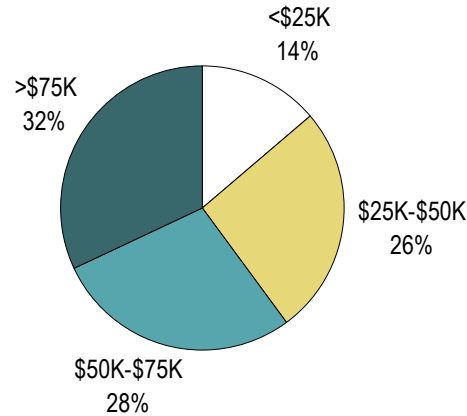
## Education

Persons 18+



## Household Income

Persons 18+



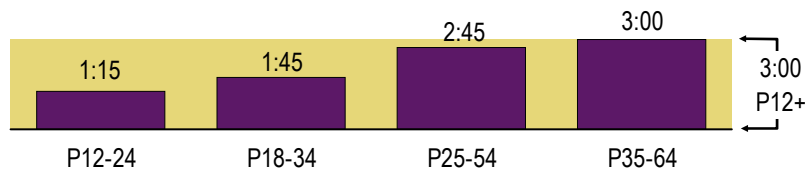
The proportion of Jazz listeners who graduated from college has remained rather constant over the recent past, but the number of Jazz listeners who graduated from high school but did not attend college grew from 15% in Fall 2006 to 23% in Fall 2009.

Fewer Jazz listeners were in high income (\$75K) households in Fall 2009, while the number of listeners in \$50,000-\$75,000 households grew from 22% to 28% between Fall 2006 and Fall 2009.

The expansion of PPM measurement to more markets has no doubt contributed to an hour of lower Time Spent Listening in Fall 2009 than in Fall 2008 (see Page 5 for an explanation of how the change in measurement methodology can affect certain listening statistics).

## Time Spent Listening by Demographic

(Hours:Minutes)  
Mon-Sun, 6AM-Mid



Source: TAPSCAN Web, Fall 2009. Note: Due to rounding, totals may not add to 100.

## AQH Share of All Public Radio Listening

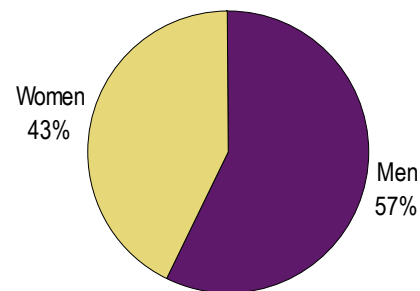
FA05	3.0%
FA06	2.5%
FA08	2.8%
<b>FA09</b>	<b>2.7%</b>

## Weekly Listeners 12+

**1,268,300**  
Format Cume

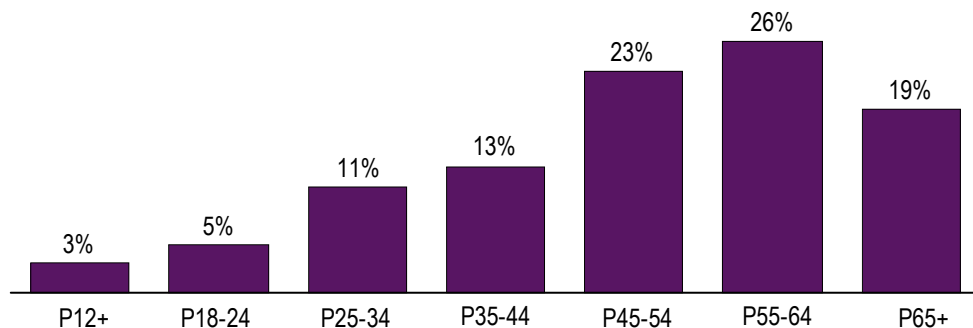
## Listeners 12+

Mon-Sun, 6AM-Mid



## Audience Composition

Percent of Format Audience by Demographic  
Mon-Sun, 6AM-Mid



News-Jazz dedicates at least 30% of its airtime to news, public affairs or talk content or carries NPR newsmagazines. In addition, these stations devote at least 30% of their airtime presenting jazz music.

The number of News-Jazz stations has grown from 20 stations to 28 in the period between Fall 2008 and a year later. As such, its Cume audience has grown from 906,200 12+ listeners to nearly 1.3 million listeners in the same time period.

The proportion of men who listen to this format has grown by four percentage points in the last year.

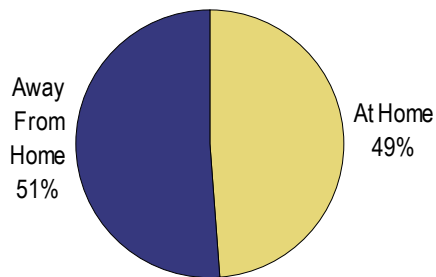
The percentage of News-Jazz listeners aged 12-44 grew from 24% in Fall 2008 to 33% a year later.

Source: TAPSCAN Web, Fall 2009. Note: Due to rounding, totals may not add to 100.

# News-Jazz

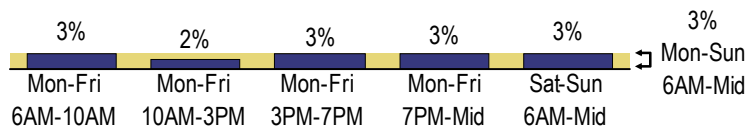
## AQH Share of Listening by Location

Mon-Sun, 6AM-Mid, Persons 12+



## News-Jazz Share of All Public Radio Listening

Persons 12+, by Daypart

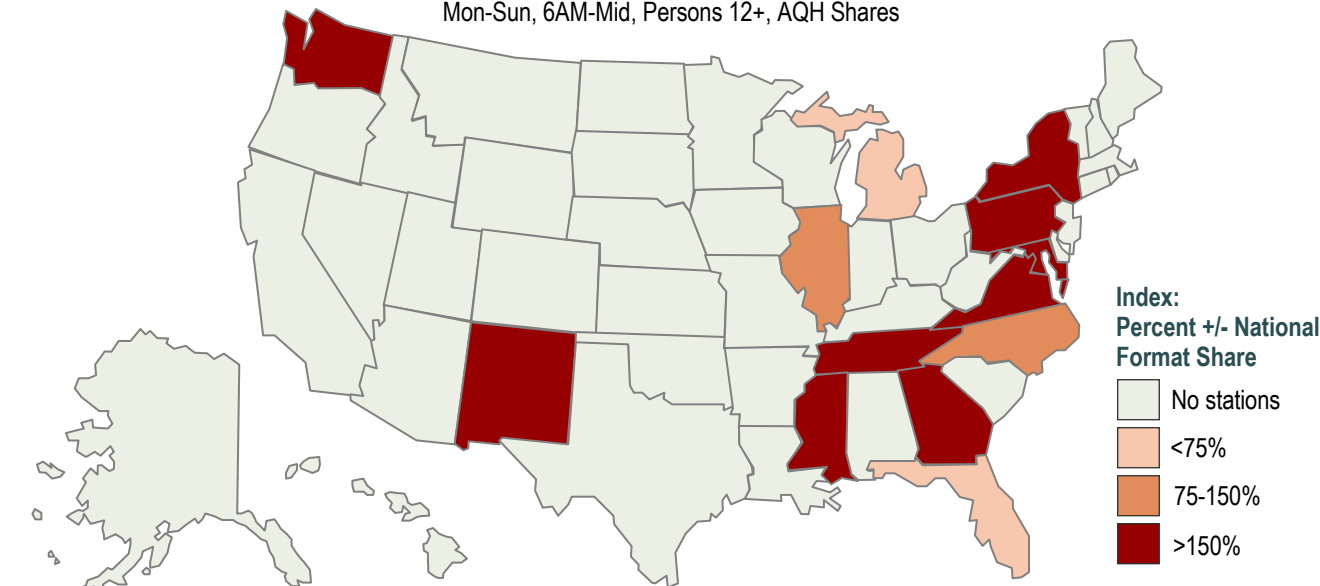


The percentage of away-from-home listening to this format has grown from 46% in Fall 2008 to 51% a year later. Thanks to its mix of news and music, News-Jazz listeners tune to their stations rather evenly around the clock and throughout the week.

With only 28 stations programming this format, there are not nearly enough stations to represent all of the states. In fact, only 13 states have News-Jazz stations that register in the ratings, most of them located in the Eastern time zone.

## Audience Share by State

Mon-Sun, 6AM-Mid, Persons 12+, AQH Shares

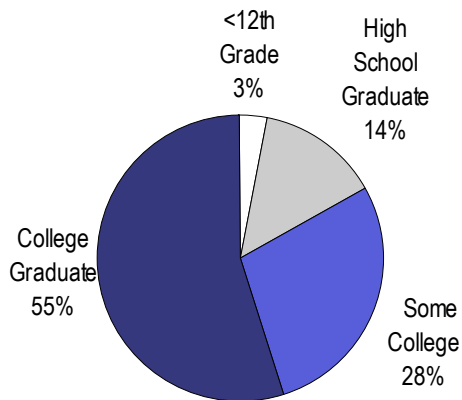


Source: TAPSCAN Web, Fall 2009. Note: Due to rounding, totals may not add to 100.

continued ►

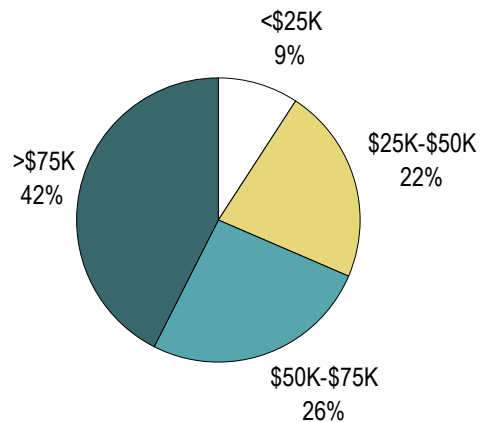
## Education

Persons 18+



## Household Income

Persons 18+

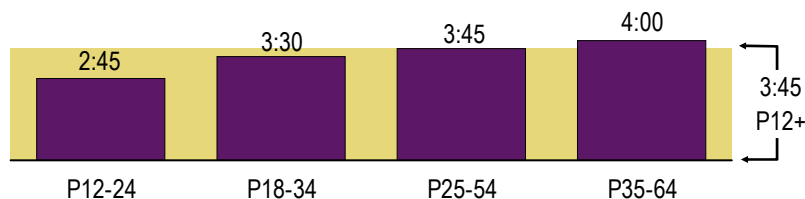


News-Jazz listeners are well educated, with 83% having attended college. More than two-thirds of the format's listeners are from households that earn \$50,000 or more.

The reported Time Spent Listening to News-Jazz is two hours per week less in this report than a year earlier; the decline was steepest among the 35-64 demographic. Some of the decline can probably be attributed to the adoption of PPM measurement in additional markets (see Page 5 for an explanation of how the change in measurement methodology can affect certain listening statistics).

## Time Spent Listening by Demographic

(Hours:Minutes)  
Mon-Sun, 6AM-Mid



Source: TAPSCAN Web, Fall 2009. Note: Due to rounding, totals may not add to 100.

# Variety Music

## AQH Share of All Public Radio Listening

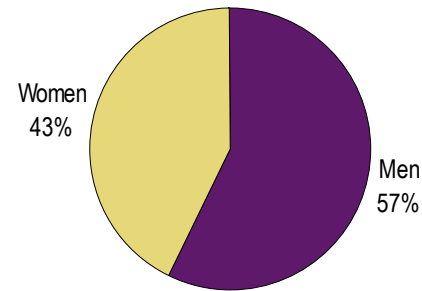
FA05	1.9%
FA06	2.0%
FA08	1.7%
<b>FA09</b>	<b>2.2%</b>

## Weekly Listeners 12+

**1,341,200**  
Format Cume

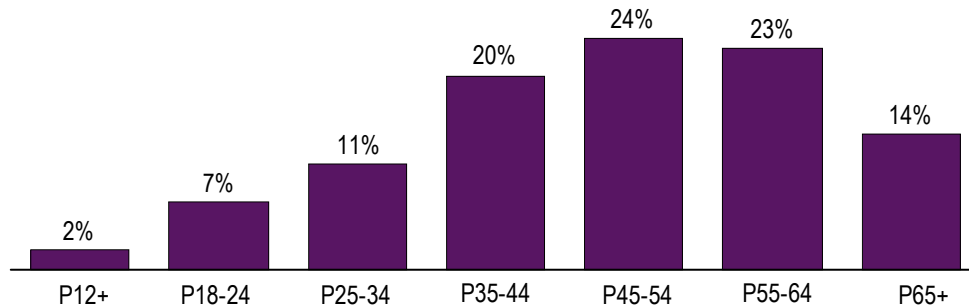
## Listeners 12+

Mon-Sun, 6AM-Mid



## Audience Composition

Percent of Format Audience by Demographic  
Mon-Sun, 6AM-Mid



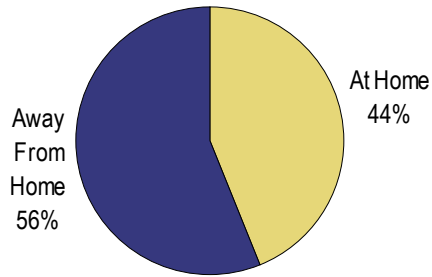
The number of stations programming this format has grown to 78 stations in this report compared to 52 stations a year earlier. For that reason, Variety Music's Average Quarter-Hour share rose to a new high and its weekly Cume audience ballooned from 800,000 listeners in Fall 2008 to more than 1.3 million in the current report. (It should also be noted that KTSU Houston, which was excluded from *Public Radio Today 2009* due to the effects of Hurricane Ike, returned to this report).

Its age composition profile and male:female ratio have remained relatively stable compared to recent years.

# Variety Music

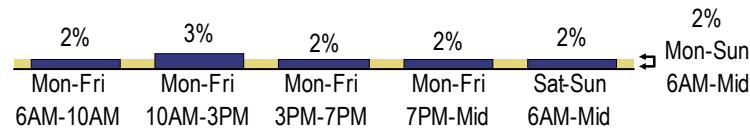
## AQH Share of Listening by Location

Mon-Sun, 6AM-Mid, Persons 12+



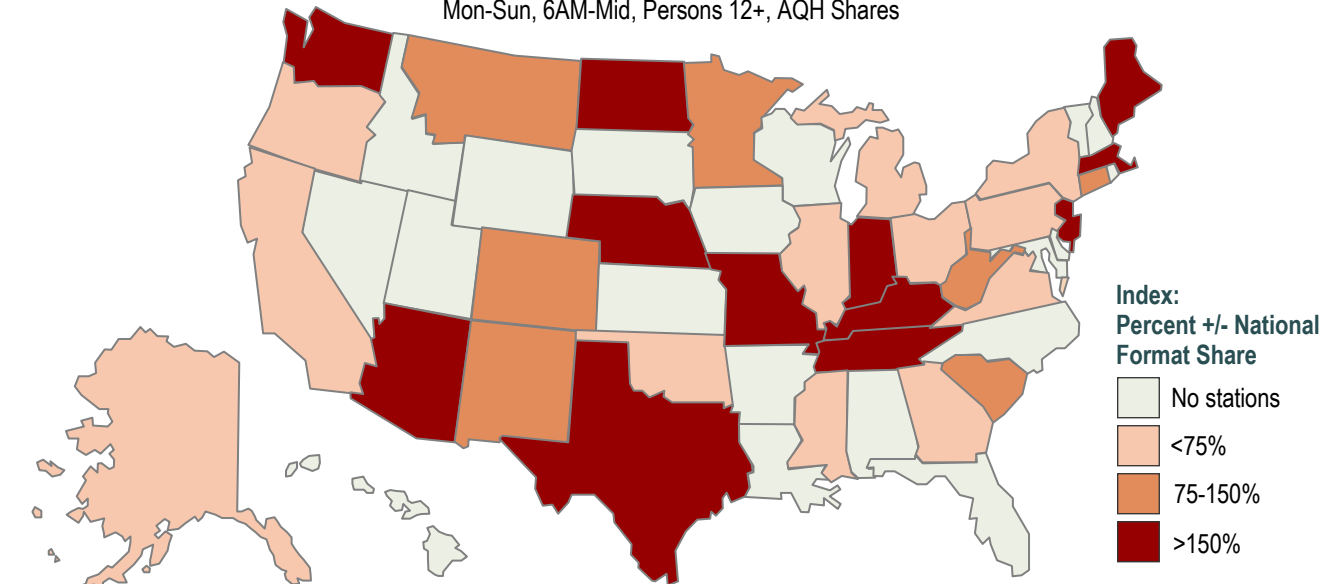
## Variety Music Share of All Public Radio Listening

Persons 12+, by Daypart



## Audience Share by State

Mon-Sun, 6AM-Mid, Persons 12+, AQH Shares



Source: TAPSCAN Web, Fall 2009. Note: Due to rounding, totals may not add to 100.

Listeners tune to Variety Music in away-from-home locations in increasing numbers. In Fall 2008, listening to this format was about evenly divided between at-home and away-from-home locations, compared to 56% of listening occurring away-from-home in the current report.

More relative listening to Variety Music occurs in morning drive; the rest of all listening is spread evenly across the remaining dayparts.

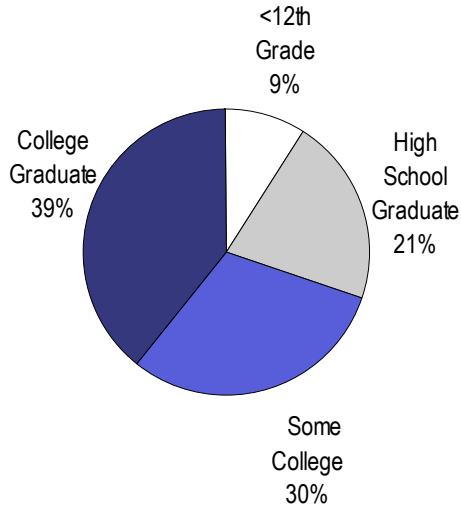
When looking at the performance of Variety Music on our new Audience Share by State "heat index," you can see that the format does well in many states with rural populations (though not exclusively so).

continued ►

# Variety Music

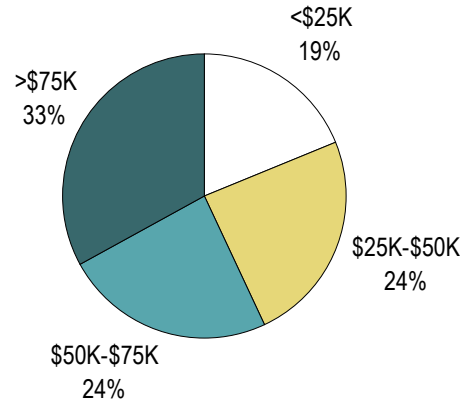
## Education

Persons 18+



## Household Income

Persons 18+

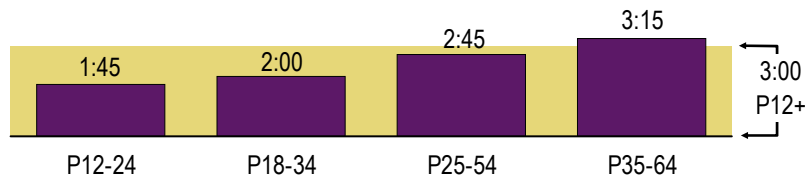


About 70% of Variety Music's listeners have attended college and about 57% of its listeners reside in households with an income of at least \$50,000.

Like most public radio formats, reported Time Spent Listening to Variety Music is significantly lower than in recent years with 35-64 demographics holding up best (see Page 5 for an explanation of how the change in measurement methodology can affect certain listening statistics).

## Time Spent Listening by Demographic

(Hours:Minutes)  
Mon-Sun, 6AM-Mid



Source: TAPSCAN Web, Fall 2009. Note: Due to rounding, totals may not add to 100.

## AQH Share of All Public Radio Listening

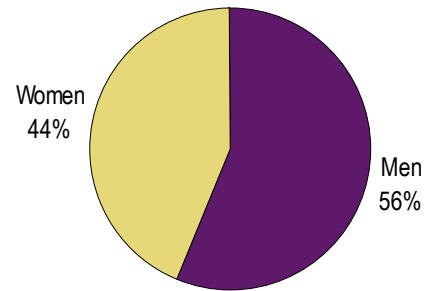
FA05	n/a
FA06	n/a
FA08	n/a
<b>FA09</b>	<b>1.0%</b>

## Weekly Listeners 12+

**372,500**  
Format Cume

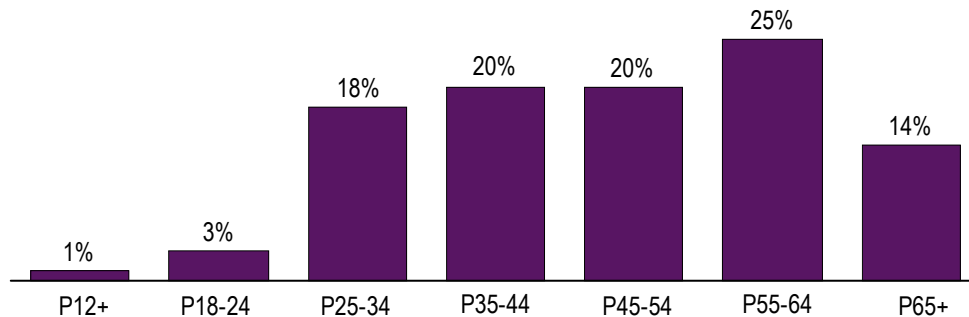
## Listeners 12+

Mon-Sun, 6AM-Mid



## Audience Composition

Percent of Format Audience by Demographic  
Mon-Sun, 6AM-Mid



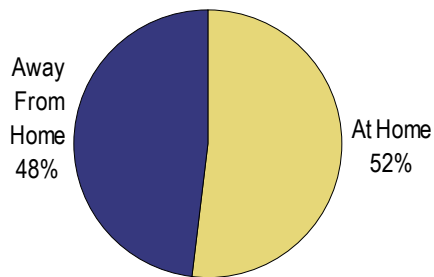
News-AAA programming dedicates at least 30% of its airtime to news, public affairs or talk content or carries NPR newsmagazines. In addition, these stations devote at least 30% of their airtime presenting AAA music.

This is the first time Arbitron *Public Radio Today* reports on this format, which is programmed by 39 stations.

Much like its component formats, News-AAA leans male and its demographic profile is solidly in the 25-64 age group.

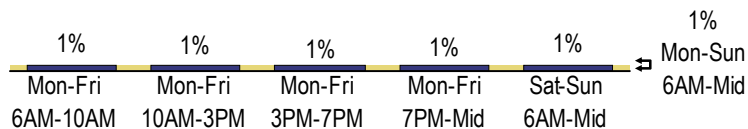
## AQH Share of Listening by Location

Mon-Sun, 6AM-Mid, Persons 12+



## News-AAA Share of All Public Radio Listening

Persons 12+, by Daypart

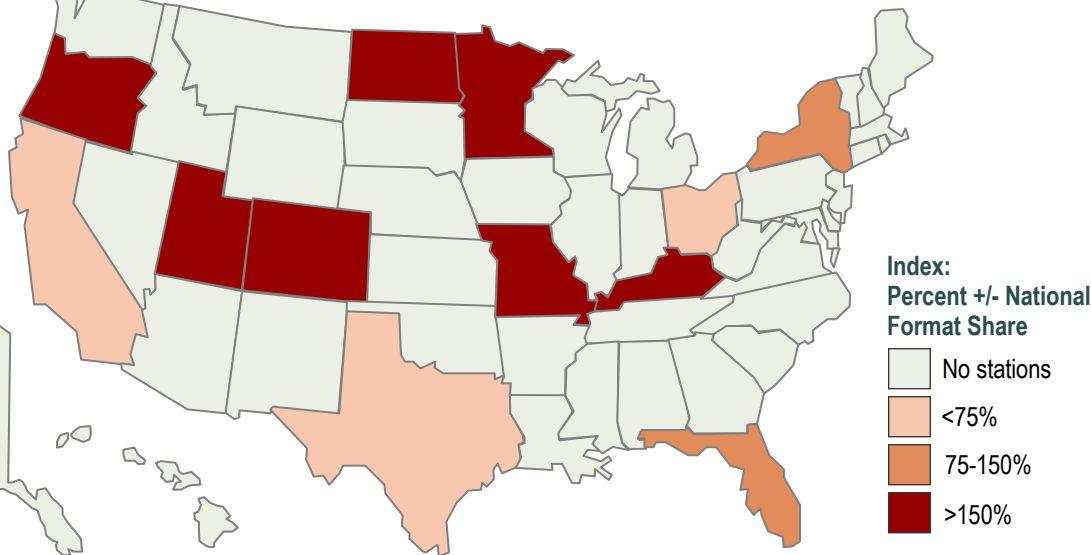


As you can see in the pie chart on the left, listeners divide their time with News-AAA stations nearly equally at home and away from home. Listening across the major dayparts doesn't vary much (note that the overall quarter-hour share of 1% wouldn't produce much variation anyway).

News-AAA's strength is decidedly in the less populous states, though it rates about average in Florida and New York.

## Audience Share by State

Mon-Sun, 6AM-Mid, Persons 12+, AQH Shares

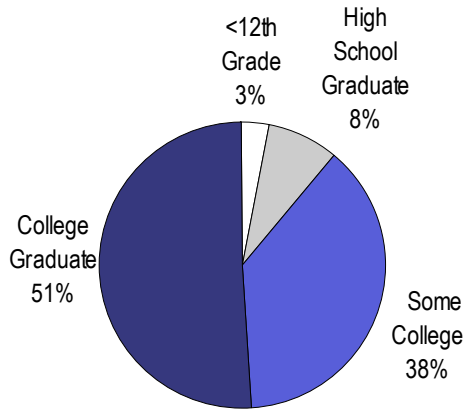


Source: TAPSCAN Web, Fall 2009. Note: Due to rounding, totals may not add to 100.

continued ►

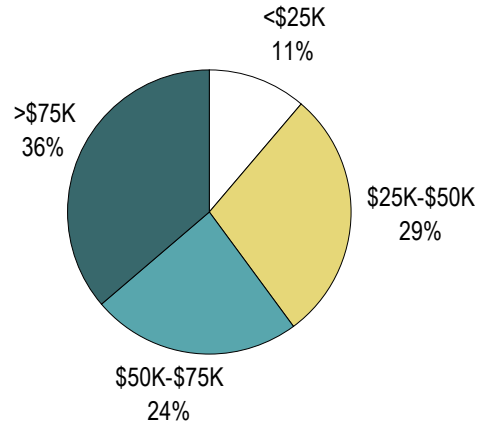
## Education

Persons 18+



## Household Income

Persons 18+

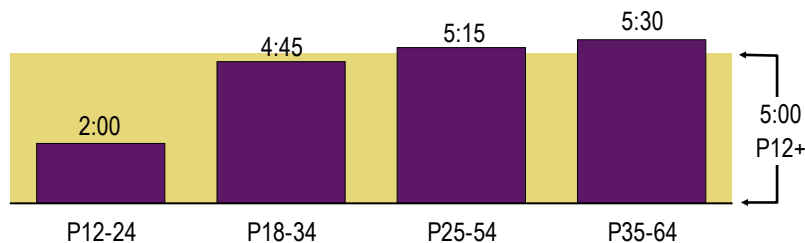


News-AAA listeners are among the best-educated public radio listeners, with nearly 90% having attended college.

News-AAA's Time Spent Listening figures are comparable with other formats that program news-music hybrid formats.

## Time Spent Listening by Demographic

(Hours:Minutes)  
Mon-Sun, 6AM-Mid



Source: TAPSCAN Web, Fall 2009. Note: Due to rounding, totals may not add to 100.

# Scarborough Qualitatives

*Public Radio Today 2010* provides expanded insights into household factors, employment and homeownership, culled from our Scarborough Research databases. You'll also find indices for these consumer behaviors among public radio listeners:

- Financial Planning
- Business Travel
- Automobile Model Preferences
- Food and Beverage (including restaurant patronage and grocery store spending)
- Online Activity

# Household Characteristics

## Scarborough Qualitative—Household Characteristics

Employment Status	Index
Employed	109
Manager/professional occupation	161
Household income under \$50K	70
Household income \$50K-99K	110
Household income \$100K+	151
Median household income = \$74,500	

Homeownership Status	Index
Homeowners	110
Own single family dwelling	111
Own condo, apartment, etc.	105

Although demographics of public radio listeners vary by format, when we focus on the adult public radio audience in total, we see that most are employed, well-positioned in professional careers and earning incomes that place them well above the median for total U.S. households. Public radio listeners have median household incomes of \$74,500, 35% higher than the median for total households (\$55,300).

A majority of public radio listeners are homeowners (79%), most owning single family dwellings (66%), and they do a better than average job of keeping up with home maintenance and undertaking home improvement projects. Both local and national companies wishing to reach highly qualified homeowners have an ideal opportunity to do so through public radio underwriting programs.

# Household Characteristics

## Scarborough Qualitative—Household Characteristics

Compared to total homeowners, those who are public radio listeners are more likely to live in households that:

	Index
Have a home office	127
Have a home equity loan	125
Plan to buy an energy saving appliance next 12 months	116
Have a home security system	115
Did landscaping improvement past 12 months	113
Did exterior painting past 12 months	112
Replaced windows past 12 months	111
Purchased furniture past 12 months	109
Have a pest control service	108
Have a home improvement loan	107
Did interior painting/wallpapering past 12 months	106

## Scarborough Qualitative—Financial Planning

Savings Products (Household)	Index
Savings account	109
401k plan	130
IRA	144
CDs	129
Money market account	147
<i>Among households with children:</i>	
529 college savings plan	190

Professional Services (Household)	Index
Accountant past 12 months	138
Financial planner past 12 months	145
Stockbroker past 12 months	155

Loans (Household)	Index
Home mortgage	122
Auto loan	103
Home equity loan	133
Refinanced home mortgage	129
Home improvement loan	151

Investment Products (Household)	Index
Any investment	126
Mutual funds	150
Stocks/stock options	138
Money market funds	148
Bonds	146
Other security or investment	125
Second home/real estate property	134

Public radio listeners live in households where saving is valued. Most of them have savings accounts (73%) and they are much more likely than total U.S. households to have IRAs, 401k plans, CDs and money market accounts. Among households with children, public radio listeners are nearly twice as likely to have a 529 college savings plan.

Listeners are also avid investors—a strong majority of these households have some type of investment product (68%). They show above-average participation in mutual funds, money market funds, bonds and stocks. They are more likely than the general population to use stockbrokers, financial planners and accountants.

In line with their high rates of homeownership, public radio listeners are above the national norm for having mortgages, home equity loans and home improvement loans.

## Scarborough Qualitative—Business Travel

Travel	Index
Business travelers*	130
Stayed at hotel/motel on business past 12 months	131
Domestic air travel for business past 12 months	153
Car Rental for business past 12 months	154
Any foreign business trip past 3 years	148
* Business travelers are defined as those who have rented a car, or traveled by air to domestic destinations, or stayed at a hotel/motel (or done any combination of these things) for the purpose of conducting business during the past 12 months.	

About one-third of public radio listeners (32%) are business travelers, and they rank well above national norms for using hotels, air travel and rental cars while engaged in doing business.

Public radio listeners average 3.5 business trips by air in a typical year.

The business traveler segment of the public radio audience is an ideal target for marketers representing airlines, hotels, car rental companies and credit card companies.

The segment is also a very good fit for an array of goods and services that meet the special needs of road warriors. Compared with all business travelers, those who are public radio listeners are more likely to use online resources for information and entertainment; more likely to be interested in health and relaxation; and more likely to purchase business apparel and compact digital equipment.

## Scarborough Qualitative—Business Travel

Compared with all business travelers, those who are public radio listeners are more likely to:

	Index
Buy airline tickets online	135
Make other travel reservations online (hotels, cars, etc.)	133
Visit radio station Web sites	132
Listen to radio online	129
Participate in business travel decisions for their company	124
Download/watch television programs	122
Check news online	119
Belong to a health/exercise club	116
Use social networking sites	115
Pay bills online	115
Use gold/platinum credit cards	114
Plan to buy a PDA	114
Purchase business apparel	113
Buy energy/nutrition bars	109
Check sports scores/updates online	109
Download/watch movies	109
Download/listen to music	109

# Automotive Preferences

## Scarborough Qualitative—Automotive: Three-Year Trend In Model Preference

**2009: Among public radio listeners in households planning to purchase a new or used vehicle or to lease a new vehicle during next 12 months**

	New	Used	Lease
Midsized car	24%	24%	23%
SUV	23%	22%	31%
Compact car	18%	21%	10%
Pickup truck	15%	22%	4%
Luxury vehicle	14%	9%	21%
Full-size car	10%	6%	14%
Van/mini-van	9%	13%	8%
Median amount budgeted	\$24,300	\$10,500	\$27,000*
<small>Note: Columns add to more than 100% because some will buy/lease more than one vehicle. * Budgets for leasing are based on the retail selling price of the vehicle.</small>			

About one of every five public radio listeners (18%) report that their household is planning to buy or lease a vehicle during the next 12 months. This is down only slightly from 2006 (20%). However, there have been some shifts in thinking regarding the size of vehicles that these consumers are planning to buy.

Among those who will buy a new vehicle, more are considering a midsize car or an SUV than any other model type. Buyers are significantly more likely to be planning to purchase a compact car in 2009 than they were in 2006.

Those who plan to buy a used vehicle are about equally divided across four model types—midsize, SUV, compact and pickup. Buyers for used cars are significantly more likely to be considering a used SUV in 2009 than they were in 2006.

Lessees will go big in their choice of vehicle—nearly one-third are considering an SUV, followed by a midsize or luxury vehicle. Lessees are significantly more likely to plan to lease a midsize car and less likely to be considering a luxury vehicle in 2009 than they were in 2006.

# Automotive Preferences

## Scarborough Qualitative—Automotive: Three-Year Trend In Model Preference

**2006: Among public radio listeners in households planning to purchase a new or used vehicle or to lease a new vehicle during next 12 months**

	New	Used	Lease
Midsized car	25%	25%	18%
SUV	22%	18%	31%
Compact car	13%	19%	12%
Pickup truck	13%	23%	4%
Luxury vehicle	15%	9%	34%
Full-size car	10%	9%	9%
Van/mini-van	12%	13%	6%
Median amount budgeted	\$25,000	\$11,100	\$29,500*
<p>Note: Columns add to more than 100% because some will buy/lease more than one vehicle.            * Budgets for leasing are based on the retail selling price of the vehicle.</p>			

## Scarborough Qualitative—Restaurant Patronage by Daypart

### Public Radio Listeners:

96%	Any restaurant used past 30 days
85%	Fast food restaurants past 30 days
<i>Average # of meals per month = 5.4</i>	
86%	Sit-down restaurants past 30 days
<i>Average # of meals per month = 4.6</i>	
49%	Breakfast at restaurant past 30 days
79%	Lunch at restaurant past 30 days
85%	Dinner at restaurant past 30 days

Nearly all public radio listeners dine out during a typical month (96%). A majority of them patronize fast food restaurants (85%) and a similar number use sit-down restaurants (86%).

It could be very beneficial for underwriters from the food service industry to consider the potential of the public radio audience by daypart. The following information puts an approximate size to the segments seeking a dining destination for breakfast, lunch and dinner.

Just about half of all public radio listeners report eating breakfast out (49%). Roughly half of that group head only for the drive-through window; about one-quarter go only to sit-down restaurants; and the rest use both.

The segment of listeners eating lunch out is much larger (79%), and fast food restaurants continue to edge out sit-down restaurants as a choice for the lunch crowd.

For dinner, the largest group of public radio listeners is selecting a dining spot (85%) but for many it doesn't have to be anything fancy—more than half the group uses both sit-down and fast food restaurants for dinner during a month; about one-third go only to sit-down restaurants; the rest do not consider anything but fast food.

## Scarborough Qualitative—Restaurant Patronage by Daypart

### Among public radio listeners who ate breakfast out past 30 days:

Used both fast food and sit-down restaurants for breakfast (22%)
Used only fast food for breakfast (54%)
Used only sit-down for breakfast (24%)

### Among public radio listeners who ate lunch out past 30 days:

Used both fast food and sit-down restaurants for lunch (44%)
Used only fast food for lunch (43%)
Used only sit-down for lunch (13%)

### Among public radio listeners who ate dinner out past 30 days:

Used both fast food and sit-down restaurants for dinner (54%)
Used only fast food for dinner (14%)
Used only sit-down for dinner (32%)

# Food and Beverage

## Scarborough Qualitative—The Grocery Basket

Grocery Spending (Household)	Index
Shopped for groceries past 7 days	100
Spent \$100+ on groceries past 7 days	103
Average weekly household grocery spending = \$123	

Shopper Choices (Household)	Index
Grocery coupons	101
Store brands	112

Items Purchased Past 30 Days (Household)	Index
Processed breakfast/lunch meats	94
Frozen treats	100
Dry cereal	105
Salty snacks	101
Regular coffee	107
Yogurt (not frozen)	115
Nuts	121
Candy	97
Soup	99
Tea	108
Frozen meals	96
Salsa	105
Tortillas	99
Energy bars/nutrition bars	119
Any organic food	158
Decaffeinated coffee	110

Virtually all public radio listeners live in households that shop for groceries at least once a week (99%). In most of these households, the grocery bill runs \$100+ per week (66%), with average weekly spending of \$123.

Public radio listeners do keep an eye out for a bargain—in a majority of their households grocery coupons are used every month (64%) and the pantry contains store brands (51%).

It is indicative of an interest in good nutrition that the households of public radio listeners are significantly more likely to use organic food, nuts, energy bars, non-frozen yogurt and decaf coffee when compared to the national norm. But it's all about balance—a majority of these households are also using processed breakfast/lunch meats, frozen treats, dry cereal, salty snacks, regular coffee and candy.

## Scarborough Qualitative—Beverages

Coffee Usage	Index
Household used coffee past 30 days	105
Drank specialty coffees past 7 days	113

Beer Usage Among Adults, Age 21+	Index
Drink beer	110
Drank beer past 30 days	112
Drank microbrew past 30 days	191
Beer at restaurant past 30 days	125

Wine Usage Among Adults, Age 21+	Index
Drink wine	124
Drink at least 2-3 times a month	144
Buy bottles of wine (store/not restaurant)	130
Average spent per bottle of wine = \$11.43	
Had wine at restaurant past 30 days	157

Coffee is a staple for public radio listeners. A majority of adults in the U.S. are fond of coffee (66%), but public radio listeners rank among the most enthusiastic—most report that regular or decaf goes from the cupboard to the cup in their households every month (70%). Listeners are also above average for enjoying hot and iced specialty coffees.

Public radio listeners are more likely than the general population to enjoy having a beer. More than half of those listeners who are aged 21 or older drink beer (53%), and nearly half have beer during a typical month (47%). And although the numbers of specialty beer drinkers are smaller, listeners are about twice as likely to drink microbrew when compared to the general population. They are also above the national norm for having a beer with a restaurant meal.

Public radio listeners are also more likely than the general population to enjoy wine. Most listeners who are aged 21 or older drink wine (66%), and well over a third of them (39%) have wine at least two or three times a month. A majority of this group buys bottles of wine at stores (58%), paying an average price of \$11.43. They are more likely than the national norm to have wine with a restaurant meal during a typical month.

## Scarborough Qualitative—Online Activity

Online Activity	Index
Have online access	115
Go online during typical month	116
Go online during typical week	117
Purchased online past 12 months	127
Average time spent online per week = 9.8 hours	
Average spent online past 12 months = \$956	

News and Information	Index
Check traffic	136
Listen to radio online	123
Seek financial information	123
Visit radio station Web sites	122
Seek news on local/community events	121
Seek medical information	115
Check weather	109
Look at real estate listings	109
Check movie listings	109
Check sports scores and updates	107

### Public radio listeners with Internet access use online communication:

Access e-mail from computers/portable electronic devices (92%)
Use any Internet feature from cell phone (25%)
Use instant messaging from computers/cell phones (24%)

Although a majority of the adult population in the U.S. is now online, public radio listeners are even more active than the national norm. Fully eight of every 10 of them go online every week (81%), for an average of 9.8 hours per week. Some of this time is invested in shopping and purchasing. Public radio listeners are more likely than the general population to make online purchases (66%) and they spend more too, an average of \$956 per year.

Public radio listeners are information seekers, and we can see this in their online behavior. Compared with all those who are active on the Internet, they are above average for listening to radio online and for visiting radio station Web sites. They are also above the norm for seeking out a variety of news and information.

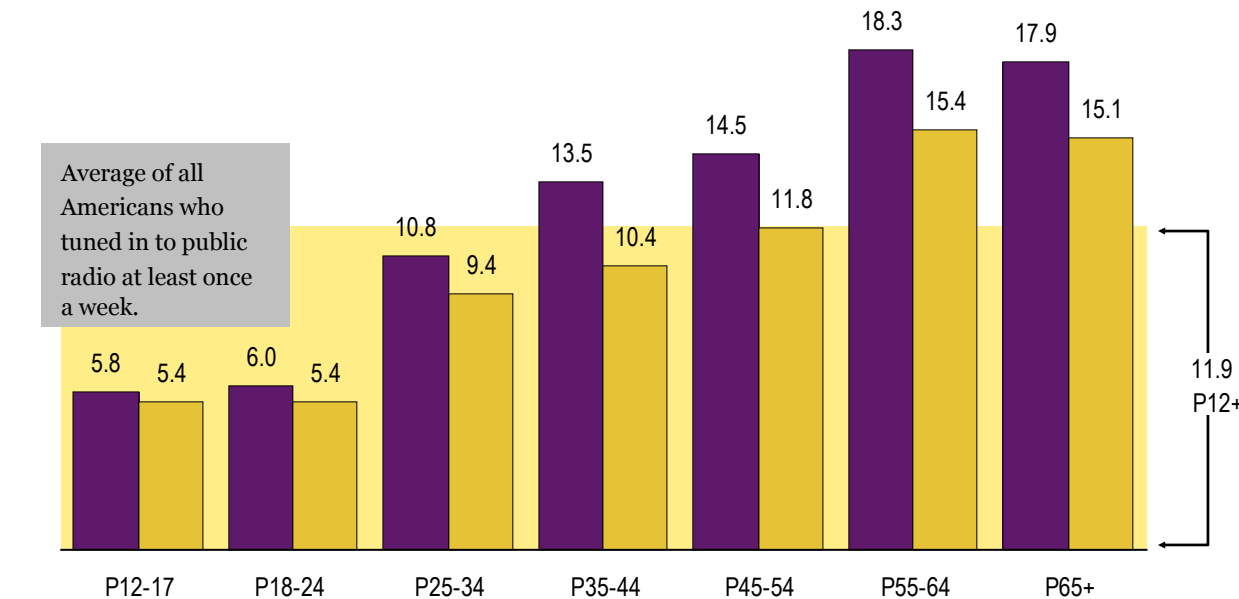
Online avenues for personal communication continue to multiply, and many public radio listeners are taking advantage of these avenues using a variety of electronic devices. About one-fourth are now going online from cell phones (25%), a similar number are using instant messaging from computers or cell phones (24%) and almost all are accessing e-mail from computers or other electronic devices (92%).

# National Public Radio Listening Trends

This section details nationwide listening trends among public radio audiences. You'll see their listening patterns traced by age and gender, on an hour-by-hour basis and according to listening location. Also presented are informative format rankings by audience share and geographic region. In these pages you can see that from dawn to dusk, on weekdays and weekends, at home or away, public radio is a vibrant and integral part of its listeners' lives.

# Public Radio Reaches All Ages

**Weekly Cume Rating**  
Percent of Population That Tunes In to Public Radio



Men  
Women

**How To Read:**

These figures represent “weekly Cume ratings.” For example, in the Fall of 2009, 13.5% of all men aged 35-44 in the United States tuned in to public radio between the hours of 6AM and Midnight, Monday through Sunday, at least once during the week. The yellow background represents the average of all Americans, at least 12 years old, who listen to public radio at least once during the week. With that background, you can then see how public radio reaches various demographic groups compared to its national average.

People of all ages listen to public radio each week, with the proportion of men slightly outnumbering women.

Overall, public radio continued to expand its weekly reach, rising from 11.8% to 11.9% of the U.S. population over the last year.

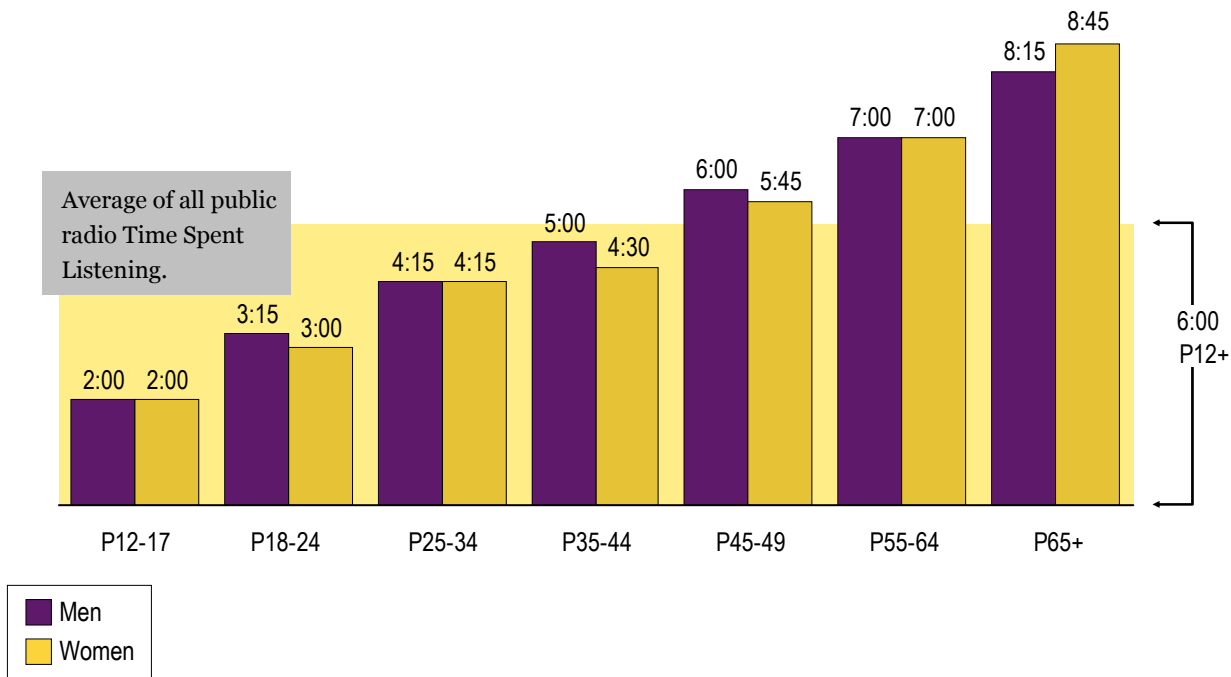
Weekly reach among 45-64 listeners fell slightly from the previous year, but that decrease was more than made up for by increased listening among younger listeners. For example, in Fall 2009 public radio reached about 10% of all listeners aged 25-34 on a weekly basis.

Source: TAPSCAN Web, Fall 2009. Note: Due to rounding, totals may not add to 100.

# Public Radio Reaches All Ages

## Time Spent Listening to Public Radio

Hours:Minutes per Week

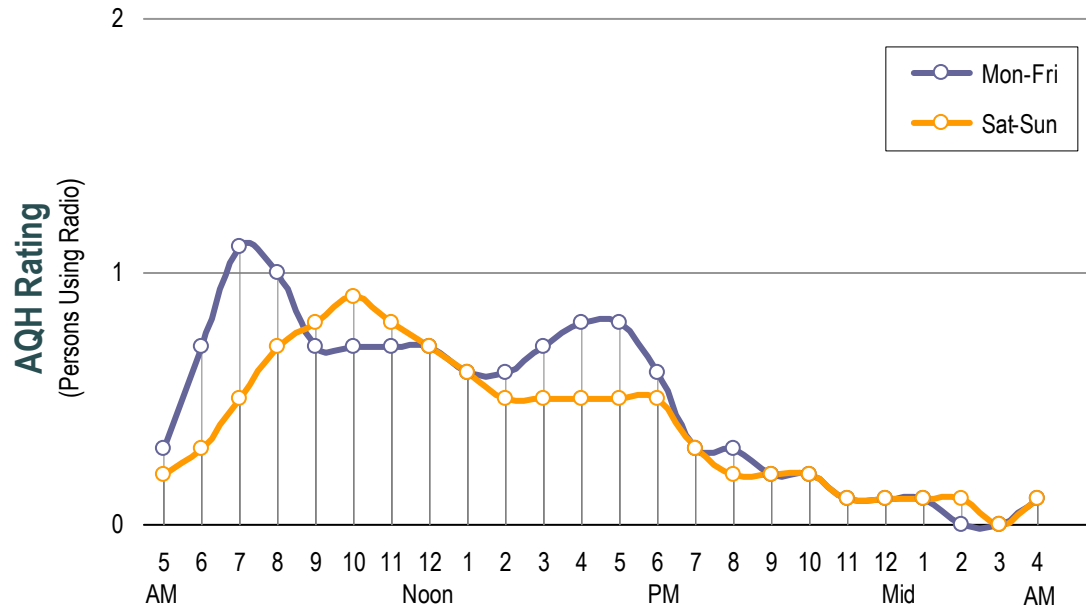


As the chart shows, older public radio consumers spend more time listening than anyone else, a pattern that's been consistent for years. Overall, men listen to public radio at slightly higher levels than do women.

Source: TAPSCAN Web, Fall 2009. Note: Due to rounding, totals may not add to 100.

# Hour-by-Hour Listening

## Hour-by-Hour Listening, AQH Rating



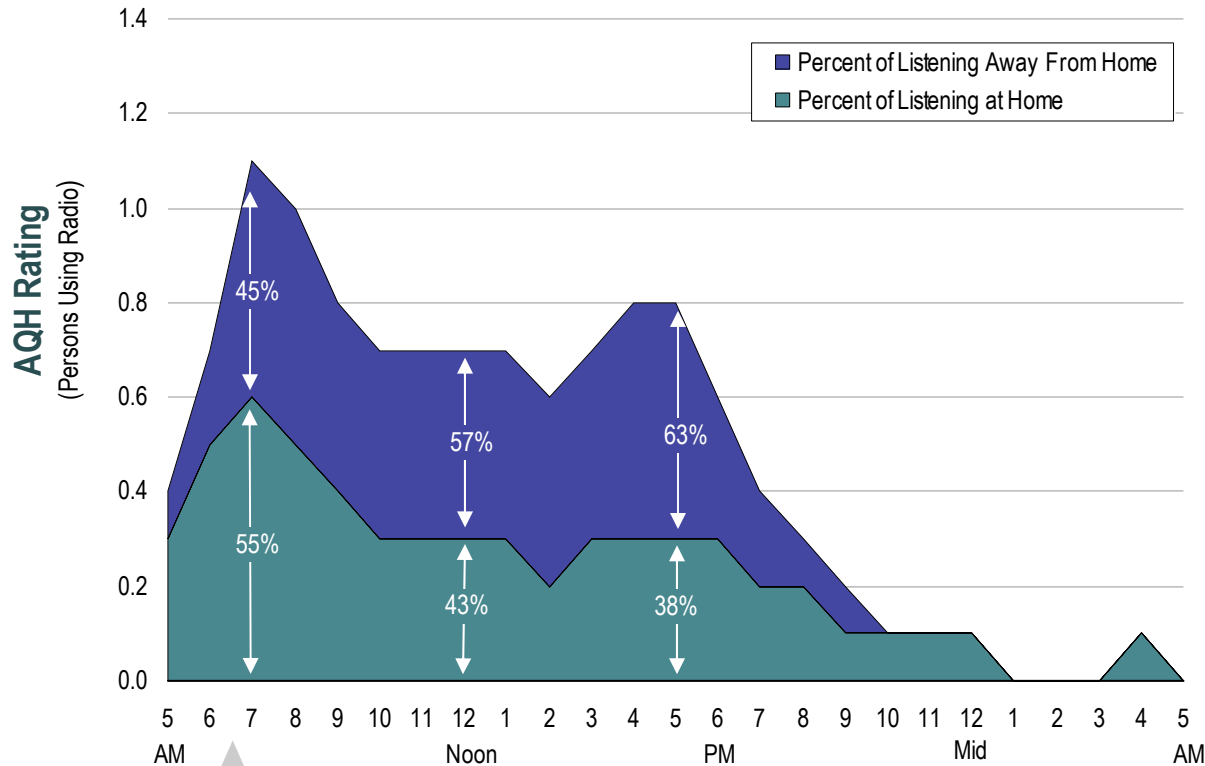
This chart illustrates a familiar pattern in which public radio listening kicks in during the week at 6AM and peaks between 7AM and 9AM. Listening remains strong throughout the workday and rises between 3PM and 6PM as employed listeners head home.

Weekend listening to public radio gets started slightly later and midday weekend ratings on public radio outperform the comparable time of the day during the week.

Reflecting radio's ability to deliver a consistent audience level year after year, the average quarter-hour rating for public radio has changed very little.

# Public Radio Listening Location: Weekdays

**Weekday Listening, AQH Rating**  
Mon-Fri, Total Day (5AM-5AM)



**How to Read:**

The graphs on this and the next page show how listening location makes up radio listening during the course of a typical weekday and weekend day. For example, during the Noon hour on this chart, about 0.7 percent of the 12+ U.S. population listened to public radio for at least five minutes. Of those who had listened, 43% had tuned in at home and 57% had listened somewhere else.

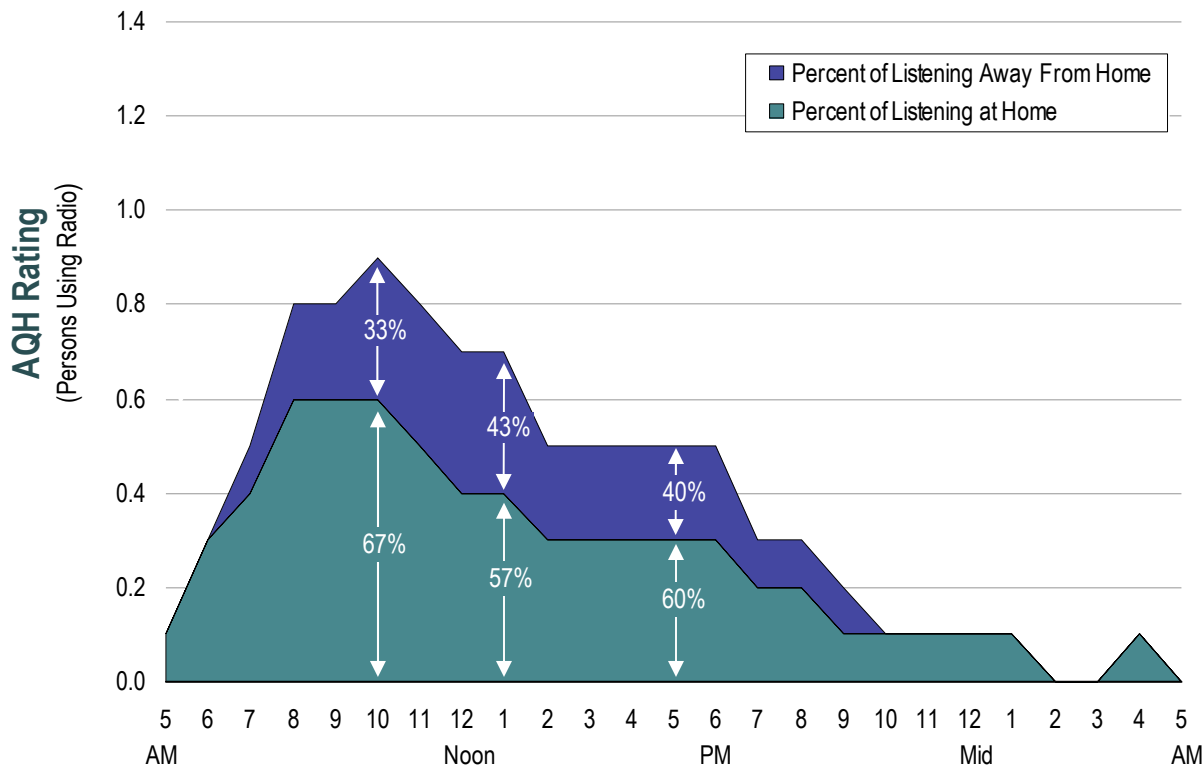
In the 12-hour period between 8AM and 8PM, at least half of all public radio listening on weekdays occurs away from the home. In the year since our last study, there have been significant fluctuations in the at-home vs. out-of-home percentages on an hour-by-hour basis with no discernable pattern. In a typical 24-hour day, seven hours experienced a significant increase in at-home listening, four hours experienced a significant increase in away-from-home listening and the remaining hours were unchanged or experienced little change.

Source: TAPSCAN Web, Fall 2009. Note: Due to rounding, totals may not add to 100.

# Public Radio Listening Location: Weekends

## Weekend Listening, AQH Rating

Sat-Sun, Total Day (5AM-5AM)



Some of public radio's most popular feature programs are heard on weekends, including Tom and Ray Magliozzi's *Car Talk*, Michael Feldman's *Whad'Ya Know* and Garrison Keillor's *A Prairie Home Companion*.

With no commute or substantial at-work listening, most public radio tune-in on the weekend occurs in the home. Throughout a typical weekend day, at least half (and usually well over half) of all public radio listening occurs in the home. Weekend ratings to public radio peaks in the late-morning hours.

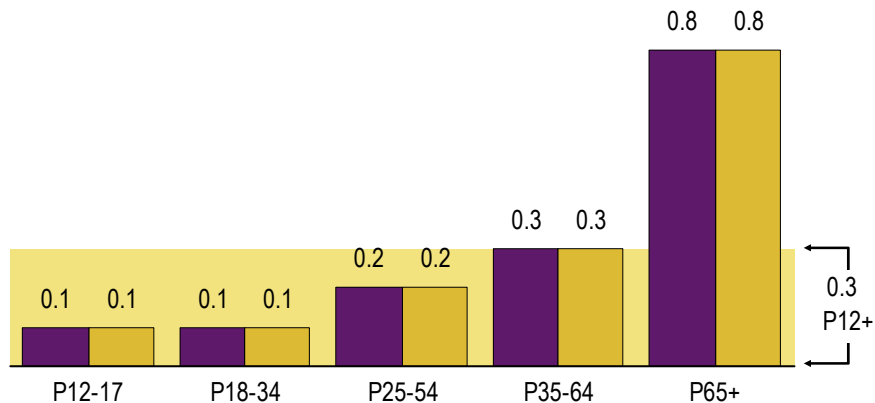
As a result of these factors, public radio earns stellar weekend ratings, with in-home listening often exceeding in-home ratings during comparable hours on weekdays.

Source: TAPSCAN Web, Fall 2009. Note: Due to rounding, totals may not add to 100.

# Public Radio Listening Location by Men and Women

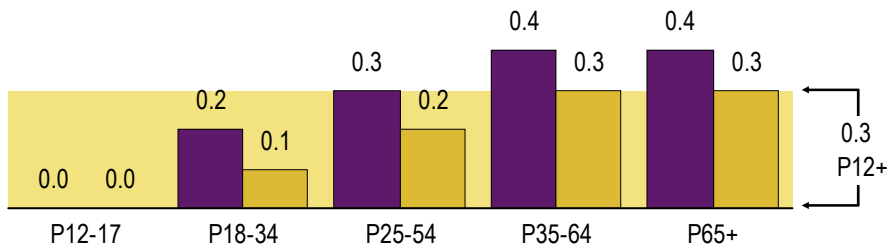
## At-Home Listening for Men and Women

Total Week, AQH Rating



## Away-from-Home Listening for Men and Women

Total Week, AQH Rating



Public radio at-home listening has held steady over the years; its away-from-home ratings have declined somewhat—a phenomenon that's likely attributable at least in part to the change in measurement methodology from Diary to the PPM service.

# Public Radio Listening Location—At Home vs. Away From Home

## Distribution of AQH Radio Listeners by Listening Location

Persons 12+

	Home	Away From Home
Mon-Sun 6AM-Mid	53.5%	46.6%
Mon-Fri 6AM-10AM	57.3%	42.8%
Mon-Fri 10AM-3PM	43.2%	56.8%
Mon-Fri 3PM-7PM	38.7%	61.3%
Mon-Fri 7PM-Mid	65.2%	34.8%
Weekend 10AM-7PM	61.7%	38.3%

While at-home listening is self-explanatory, away-from-home listening takes many forms: in-car, at-work and “other” listening, which includes locations such as at the gym, a friend’s house or at a picnic in the park.

# Public Radio Listening by Time of Day

## Public Radio's Reach by Daypart Cume Ratings

		Mon-Fri 6AM-10AM	Mon-Fri 10AM-3PM	Mon-Fri 3PM-7PM	Mon-Fri 7PM-Mid	Sat-Sun 6AM-Mid	Mon-Sun 6AM-Mid
P12-17	M	2.3	1.2	2.4	1.4	2.6	5.8
	W	2.2	1.4	2.3	1.2	2.4	5.4
P18-24	M	2.3	2.5	2.6	1.7	2.9	6.0
	W	2.1	2.3	2.4	1.5	2.5	5.4
P25-34	M	6.0	4.7	6.1	3.1	5.0	10.8
	W	5.2	4.2	5.2	2.8	4.6	9.4
P35-44	M	8.4	5.6	8.2	3.8	6.4	13.5
	W	5.9	5.0	5.9	2.7	5.2	10.4
P45-54	M	8.5	6.6	8.6	4.6	7.9	14.5
	W	6.7	5.5	6.9	3.3	6.5	11.8
P55-64	M	10.7	9.6	10.9	6.0	11.4	18.3
	W	8.7	8.2	9.2	4.7	9.9	15.4
P65+	M	9.7	11.5	10.0	5.6	12.2	17.9
	W	8.2	10.0	8.4	4.4	10.4	15.1

People in different age groups listen to public radio at different times. Listening times peak for most men and women during weekday mornings between 6AM and 10AM and in the afternoons from 3PM to 7PM. Older demographics tend to listen most during the midday daypart. Public radio listening is higher on weekends among 12- to 24-year-olds and with those 55 and older. In general, a higher percentage of men than women listen to public radio.

# Public Radio Formats Ranked by Audience Share and Availability

## Public Radio Formats Ranked by Audience Share Among All Public Radio Listening

Mon-Sun, 6AM-Mid, AQH Persons 12+, Fall 2009

Format	Share
News Talk	44.8%
News-Classical	21.2%
Classical Music	15.4%
News-Music	5.6%
Adult Album Alternative (AAA)	3.7%
Jazz	3.5%
News-Jazz	2.7%
Variety Music	2.2%
News-AAA	1.0%

## Public Radio Formats Ranked by Availability Among All Public Radio Listening

Mon-Sun, 6AM-Mid, AQH Persons 12+, Fall 2009

Format	Number of Stations
News Talk	333
News-Classical	250
Classical Music	109
News Music	113
Variety Music	78
Adult Album Alternative (AAA)	57
Jazz	37
News-AAA	39
News-Jazz	28

Source: TAPSCAN Web, Fall 2009.  
Note: Due to rounding, totals may not add to 100.

# Public Radio Formats Ranked by Audience Share by Demographic

## Public Radio Formats Ranked by Audience Share by Demographic

Figures noted are share of listening to formats within each demographic group. Mon-Sun, 6AM-Mid, AQH Persons 12+, Fall 2009

### Persons 12-17

News/Talk	40.4%
Classical	20.9%
News-Classical	13.9%
AAA	7.0%
News-Jazz	5.2%
Jazz	4.8%
News-Music	4.4%
Variety Music	2.6%
News-AAA	0.9%

### Persons 18-24

News/Talk	36.8%
News-Classical	17.3%
Classical	12.5%
AAA	10.9%
News-Music	9.3%
News-Jazz	4.8%
Variety Music	4.8%
Jazz	2.7%
News-AAA	0.9%

### Persons 25-34

News/Talk	48.8%
News-Classical	15.5%
Classical	10.6%
AAA	7.7%
News-Music	7.5%
News-Jazz	3.1%
Jazz	2.7%
Variety Music	2.4%
News-AAA	1.9%

### Persons 35-44

News/Talk	51.8%
News-Classical	16.3%
Classical	9.6%
News-Music	7.4%
AAA	3.9%
Jazz	3.7%
Variety Music	3.3%
News-Jazz	2.6%
News-AAA	1.5%

### Persons 45-54

News/Talk	50.0%
News-Classical	19.3%
Classical	10.0%
News-Music	6.0%
AAA	4.4%
News-Jazz	3.3%
Jazz	3.2%
Variety Music	2.8%
News-AAA	1.1%

### Persons 55-64

News/Talk	46.6%
News-Classical	21.6%
Classical	12.8%
News-Music	5.9%
Jazz	3.7%
AAA	3.1%
News-Jazz	3.0%
Variety Music	2.2%
News-AAA	1.1%

### Persons 65+

News/Talk	37.0%
News-Classical	26.8%
Classical	24.5%
Jazz	3.7%
News-Music	3.5%
News-Jazz	1.6%
AAA	1.4%
Variety Music	1.0%
News-AAA	0.5%

# Sources

*Public Radio Today 2010* contains radio listening and consumer behavior statistics for listeners to public radio stations in the United States. Data for the charts and graphs in this edition come from these sources:

Arbitron's TAPSCAN™ Web National Regional Database, Fall 2009, which includes quantitative radio audience information from every market surveyed by Arbitron in the United States.

Scarborough USA+, Release 2, 2009, features information gathered from more than 210,000 adults aged 18 and over nationally. Scarborough Research examines a variety of characteristics, including demographics, socioeconomic characteristics, lifestyle activities, online and offline consumer habits, local market shopping patterns and product usage, as well as media behavior. Public radio stations have utilized the Scarborough service in a variety of ways, including underwriting, membership drives, promotional development and growing listener loyalty. "Public Radio Listener" refers to the unduplicated audience of public radio formats, 6am-Midnight, during an average week.



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